ProDoc® Document Assembly Software

# Software Manual

## Version 5

www.prodoc.com

© 2006-2008 Thomson Reuters. All rights reserved.

Revised 11/7/2008

# Welcome to ProDoc®

**Thank you for choosing us as your solution for automating your practice to save time, reduce errors, and better serve your clients.**

**So you can reap the most benefit from ProDoc, the following services are standard with your subscription:**

*** Automatic Updates - We continually enhance ProDoc software and our form templates. We send you these updates at no charge several times each year and particularly before new legislation takes effect, so your ProDoc-generated documents are always current with the law.**

*** FREE Training - In a few days, you'll receive a call from our Customer Support Department to set up free phone training for you and your staff. The purpose of the training is to help your team quickly learn how to assimilate ProDoc software into your practice.**

*** Toll-Free Technical Support - Feel free to call our Customer Service Center at 800-759-5418 for any questions you may have regarding the software. We particularly encourage you to call us when you're ready to install ProDoc on your network.**

**Finally, visit www.prodoc.com/support/index.asp to view our FAQs, hours of operation, and other helpful information.**

**Many of our subscribers report that ProDoc pays for itself many times over through increased productivity and reduced error rates. Based on our experience, you'll discover ProDoc's benefits when you and your staff overcome your natural reluctance to change from your comfortable, but inefficient, way of generating documents to the new, and more efficient, ProDoc way.**

**That's why we encourage you to make the time to take advantage of our free training; it will be one of the best investments you and your staff will ever make in your practice.**

**We guarantee it!**

## For more information, please call ProDoc at 1-800-759-5418.

# Contents


## Software Manual Introduction 1

Overview of this Manual ..... 1
Warranty Information ..... 2
Customer Support ..... 2
ProDoc Website ..... 3

## ProDoc® Program Introduction 4

Welcome to ProDoc ..... 4
About ProDoc ..... 5
How ProDoc Assembles Documents ..... 6

## Chapter 1, Installation and Setup 7

Introduction to ProDoc Setup ..... 7
System Requirements ..... 7
Installing ProDoc ..... 7
Registration and Setup ..... 11
Manage Users Login ..... 13
Compatibility Mode ..... 14

## Chapter 2, Assembling Documents 16

Assembling Documents ..... 16
Document Assembly Wizard ..... 16
Document Assembly Menu ..... 16
Phase 1 - Establish Assembly Settings ..... 17
Phase 2 - Answer "Assembly" Questions ..... 23
Phase 3 - Answer "Merge" Questions ..... 26
Phase 4 - Saving Documents ..... 27
Phase 5 - Edit and Save Completed Documents ..... 27

## Chapter 3, Main Menu 29

The Main Menu ..... 29
File Menu ..... 30
Edit Menu ..... 31
Clients and Cases Menu ..... 32
PowerPacks Menu ..... 41
Print Menu ..... 41


*© 2006-2008 Thomson Reuters. All rights reserved.*

Print Blank Forms Menu ..... 42
Print Client Lists Menu ..... 43
Print Case Data Sheet Menu ..... 44
Print Form Lists Menu ..... 44
Print Global Questions Menu ..... 45
Print Volume Questions Menu ..... 45
Print Supplemental Questions Menu ..... 45
Print Worksheets Menu ..... 46
Print Labels Menu ..... 47
Print QuickText Menu ..... 47
Print Preview Window Menu ..... 48
Customize Menu ..... 49
Document Formatting Menu ..... 50
Supplemental Forms and Questions Menu ..... 54
Default Answers Menu ..... 56
Edit Forms Menu ..... 59
Form Sets Menu ..... 59
QuickText Menu ..... 60
Firm Information Menu ..... 61
Options Menu ..... 62
Assembly Settings ..... 63
Word Processor Settings ..... 64
Completed Documents Settings ..... 65
Graphic Forms Settings ..... 66
WebUpdate Settings ..... 67
Miscellaneous Personal Settings ..... 68
Backup Settings ..... 69
Small Office Suite (SOS) Settings ..... 69
Timeslips Settings ..... 71
Phone Types Settings ..... 71
Clients & Cases Settings ..... 72
Custom Fields Settings ..... 73
Firm Information Fields Settings ..... 73
Firm Information in Answers ..... 74
Miscellaneous Firm Settings ..... 74
Tools Menu ..... 74
Certified Mailer ..... 76
Design Labels ..... 77
Repair Data Files ..... 77

© 2006-2008 Thomson Reuters. All rights reserved.

Backup Data Files ..... 78
Database Transfer ..... 78
Registration Menu ..... 79
Register ProDoc ..... 79
Change Registration ..... 79
Change Firm Name ..... 79
Uninstalling Volumes ..... 80
Edit Volumes List ..... 81
Show Installed Volumes ..... 82
Register the PowerPacks ..... 82
Check for Updates ..... 83
ProDoc WebUpdate Window ..... 83
Browse WebUpdate History ..... 83
Cancel ProDoc Subscription ..... 84
Export Data Menu ..... 84
Window Menu ..... 86
Help Menu ..... 86

## Introduction to Florida PowerPacks 87

## Selecting a Case for PowerPack Use 89

## Child Support Guidelines 91

Child Support Guidelines Forms ..... 91
General Information Form ..... 92
Monthly Net Income Form ..... 93
Calculator Form ..... 94
Printing the Child Support Guidelines Worksheet ..... 95
Toolbar ..... 95

## Obligation Amortizer 96

Amortizing the Obligation ..... 96
Printing the Amortization Schedule ..... 97

## Payment Splitter 99

## Delinquency Calculator 101

Delinquency Calculator Toolbar ..... 101
General Form ..... 102
Child Support Form ..... 103
Alimony Form ..... 104

© 2006-2008 Thomson Reuters. All rights reserved.

Payments Form ..... 106
Judgment Form ..... 108

## UCCJEA Affidavit ..... 109

UCCJEA Toolbar ..... 109
General Form ..... 110
Children Form ..... 111
Nonparty Form ..... 113
Other Proceedings Form ..... 115
Child Support Proceedings Form ..... 117

## Financial Affidavit (>=$50,000) ..... 119

Toolbar ..... 120
Caption Form ..... 121
General Information Form ..... 122
Income Form ..... 123
Taxes Form ..... 125
Expenses Form ..... 125
Assets Form ..... 126
Liabilities Form ..... 127
Contingent Assets Form ..... 128
Contingent Liabilities Form ..... 129
Finish Form ..... 130
Statistics Form ..... 131

## Equitable Distribution System ..... 132

General Form ..... 133
Scenarios ..... 134
Main Toolbar ..... 136
List of Documents Assembled ..... 137
Property Form ..... 137
After Tax Values Form ..... 139
Pre-tax Statistics Form ..... 140
After Tax Statistics Form ..... 142

## Financial Affidavit (<$50,000) ..... 144

Toolbar ..... 145
Caption Form ..... 146
General Information Form ..... 147
Income Form ..... 148
Taxes Form ..... 150

© 2006-2008 Thomson Reuters. All rights reserved.

Expenses Form ..... 150
Assets Form ..... 151
Liabilities Form ..... 152
Contingent Assets Form ..... 153
Contingent Liabilities Form ..... 154
Finish Form ..... 155
Statistics Form ..... 156

## Tax Calculator ..... 157

Tax Calculator Toolbar ..... 158
General Form ..... 158
Income Form ..... 159
Adjustments Form ..... 160
Credits Form ..... 161
Tax Deductions Form ..... 162
Summary Report Form ..... 163
Tax Calculator's Limitations ..... 163

## Probate Inventory ..... 164

General Information Form ..... 166
Exempt Homestead Form ..... 167
Nonexempt Homestead Form ..... 168
Real Property Form ..... 168
Personal Property Form ..... 169
Out of State Real Property Form ..... 169

## Probate Accounting ..... 170

General Form ..... 173
Receipts Form ..... 174
Disbursements Form ..... 174
Distributions Form ..... 175
Capital Transactions Form ..... 175
Assets Form ..... 176
Summary Form ..... 177

## Probate Management System ..... 178

Information Used by the Probate Management System ..... 179
Toolbar ..... 179
Printing Reports ..... 181
Using the Calendar Buttons ..... 182
General Form ..... 183

© 2006-2008 Thomson Reuters. All rights reserved.

Case Status Form ..... 184
Beneficiaries Form ..... 185
Creditors Form ..... 186
Other Parties Form ..... 187
Certified Mailer Form ..... 188
Certified Mailer ..... 189

## Glossary ..... 191

Browse for Folder ..... 191
Clipboard ..... 191
Common Controls on Browse Windows ..... 191
Configuration File ..... 192
Copy ..... 192
Cut ..... 192
Default Answers ..... 192
Directory ..... 192
Filename ..... 192
Form Sets ..... 193
Global ..... 193
Global Questions ..... 193
Highlight ..... 193
License ..... 193
Master Forms ..... 193
Paste ..... 193
QuickText ..... 193
Registration ..... 193
Select ..... 193
Supplemental Forms ..... 194
Token ..... 194
ToolTips ..... 194
Volume ..... 194
Volume Questions ..... 194

## Appendices ..... 195

Appendix A - Networking ProDoc ..... 195
Appendix B - How ProDoc Works ..... 198
Appendix C - Timeslips Extension ..... 208
Appendix D - Creating Supplemental Forms ..... 221
Appendix E - Backup and Restore ..... 226

*© 2006-2008 Thomson Reuters. All rights reserved.*

**Index** **230**

*© 2006-2008 Thomson Reuters. All rights reserved.*

# Software Manual Introduction

## Overview of this Manual

### Navigating Through This Manual

Click on the blue highlighted text links throughout the manual to jump to a topic or get more information.

Click on the back arrow at the bottom of your screen, , or press **Alt + Left Arrow** on your keyboard to return to your previous view. If you scrolled or linked more than once, you will need to do this more than once to return to where you started.

Click on topic titles listed in the **Table of Contents** to jump to the indicated topic.

You can also use the bookmarks provided in the Adobe navigation pane to pick the topic you want to see.

### Quick Links to Each Program's Section

The **ProDoc Program** 4 is the primary program used for document assembly. **PowerPack** programs, specific to each state we serve, are available as additional subscription items. These programs are designed to work with ProDoc and significantly increase your productivity. These programs allow you to enter information in your clients' case files and manage the information quickly and efficiently. If calculations are necessary, the program makes them and inserts the results wherever they are needed. The information you enter is saved in ProDoc data files for future use.

You can click the blue links below to jump to the sections of this manual which describe the processes and features of different ProDoc programs.

**ProDoc Program** 4 - Covers all major program functions and includes appendices on network considerations, ProDoc's internal operations, linking your ProDoc data with Timeslips and creating your own supplemental forms.

**Florida PowerPack Programs** 87

### Other Reference Material

The following documents are stored in your ProDoc home directory in a folder named "Documentation", along with the manual.

**ProDoc Quick Reference Card** - This document gives you procedures for major ProDoc functions, short and to the point, on two pages.

**ProDoc Quick Start Guide** - This document is the electronic version of the pamphlet inside your CD shipping jacket. It helps you quickly start assembling documents with ProDoc and guides you step-by-step through the **Quick Start Assistant** procedures.

The **ProDoc Software Manual, Quick Reference Card** and **Quick Start Guide** can also be viewed and/or printed from your desktop by clicking **Start > Programs > ProDoc > Documentation,** then clicking the appropriate file name.

# Warranty Information

**Legal Notices**

Subject to the Terms and Conditions of the ProDoc Subscription License Agreement and the ProDoc End User License Agreement.

**Disclaimer of Warranty**
This publication is designed to provide accurate information in regard to the subject matter covered. It is provided with the understanding that ProDoc, Inc. is not engaged in rendering legal or other professional services. You are urged to independently verify the accuracy of all of the form language and calculations prepared using the ProDoc® Document Assembly and/or Small Office Suite Software (SOS®) so that you are certain of the desired legal, business, and tax consequences and other intended results.

The material in the ProDoc Document Assembly and/or Small Office Suite Software and this manual are provided without representation or warranty of any kind. Therefore, ProDoc, Inc. and its licensors and/or authors, assume no responsibility and shall have no liability, consequential or otherwise make no warranties of any kind arising from the use of the Software, manuals or any supplementary programs and material released by ProDoc, Inc.

THIS DISCLAIMER SPECIFICALLY INCLUDES ANY EXPRESS OR IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE OR OF NONINTERFERENCE WITH INFORMATION, NONINFRINGEMENT, OR ACCURACY OF INFORMATIONAL CONTENT. RONALD LIPMAN AND LIPMAN'S WILLS AND TRUSTS, LTD. ARE INTENDED THIRD PARTY BENEFICIARIES OF THE LIMITATIONS OF LIABILITY UNDER THIS AGREEMENT.

**Copyright and Trademark Notices**
The ProDoc Document Assembly Software and this manual are protected by United States copyright and/or patent laws, and international treaty provisions. You must treat the Software and manual like any other legally protected material. You may make one copy of the Software solely for backup or archival purposes. You may not reverse engineer, decompile, or disassemble the Software. You may not copy the manual. All title and copyrights in and to the Software are owned by Thomson Reuters or its Licensors.

Microsoft, Excel, Microsoft Word, Windows, Windows CE, Windows 98, Windows Me, Windows NT, Windows XP, Windows Vista, Windows Mobile, and ActiveSync are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. Adobe, Acrobat, and Reader are either registered trademarks or trademarks of Adobe Systems Incorporated in the United States and/or other countries. WordPerfect is a registered trademark of Corel Corporation. Timeslips is a registered trademark of Sage Software SB, Inc. Palm and Handspring are registered trademarks of Palm Inc. All other trademarks are owned by their respective owners.

ProDoc, SOS and PowerPack are trademarks or registered trademarks of Thomson Reuters.

# Customer Support

## Telephone Assistance

Our staff of highly skilled support technicians and attorney developers are available to assist qualified users during regular business hours. The phone number for support is 800-759-5418.

You can also send an email to tech@prodoc.com.

## Other Available Support Resources

- Help buttons on each ProDoc window
- Quick Reference Cards
- At the **ProDoc Web site**:
  - Online Tips and FAQs
  - Computer Based Training (CBT) Modules
  - Periodic Internet live training seminars
  - Schedule training seminars in your area

## ProDoc Website

You are also invited to visit our Internet Web site at www.prodoc.com, which provides helpful information such as ProDoc Tips, Tech Notes, a list of frequently asked questions/answers (FAQs) and computer based training modules for major ProDoc functions. You can also schedule training seminars convenient to your location (subject to geographic availability) and join live seminars conducted over the Internet.

Current and prospective customers will also find a wealth of information about ProDoc, including major features and sales information. Our Web site is constantly undergoing changes so be sure to visit often. Let us know how we can improve its overall content to better serve your needs.

# ProDoc® Program Introduction

## Welcome to ProDoc

## Congratulations!

You have purchased the finest document assembly system for legal professionals available today. It is a revolutionary tool which vastly increases office productivity by automating repetitive document assembly tasks.

Several features make ProDoc superior to many other document assembly programs:

- **Displaying in Context** — The "cut-and-pasted" form is displayed while you are answering the fill-in-the-blank questions. If you prefer to answer the questions in questionnaire boxes instead of the context window, you may do so.
- **Client/Case Manager** — You can easily create and update clients and cases, even while you are simultaneously selecting a case. The related **Case Answers** feature helps you change answers to the questions asked during previous document assembly sessions for each client and their individual cases. When you assemble subsequent documents for a case, you have the option of answering only the new questions which you have not previously answered. You can still review each question previously answered if desired.
- **Document Manager** — The document manager feature helps you keep track of what documents you have assembled for each client and case. It has many of the same features as your Windows Explorer (file manager) to facilitate the management of all of your documents right from ProDoc.
- **Working with Multiple Documents** — Since law offices generally work with sets of related documents, ProDoc is designed to assemble multiple documents in a single session. This capability is further facilitated by the **Form Sets** feature, which allows you to pre-select commonly used groups of forms. These features are an extremely efficient way to produce documents because related information is shared between documents and fewer questions must be answered.
- **Supplemental Forms (templates)** — You can prepare your own supplemental forms, create the necessary fill-in-the-blank questions, and generate the finished document in ProDoc. Your supplemental forms and questions are kept separate from the ProDoc master forms (templates) and questions, but you can assemble supplemental forms in the same session with the ProDoc standard forms.
- **Graphic forms capability** — This gives you the capability to assemble popular predefined fill-in-the-blank graphic forms. These forms can be assembled and printed directly from within ProDoc. Press the **F1** key while using the **Graphic Form Filler** to see additional information on how to assemble and print these forms.
- **Timeslips extension (optional feature)** — If you have Timeslips (version 9.1 or newer), you can integrate it with ProDoc to generate Timeslips "slips" while maintaining synchronized ProDoc and Timeslips databases. Consult **Appendix C** 208 for assistance in setting up and using this optional feature.
- **Long filename support (Windows 98/ME/NT/2000/XP/Vista)** — This enhancement permits the use of more descriptive names for completed documents and their storage folders. Click the **Help** button on the **Options And Settings** window for assistance in setting up your operating preferences.
- **Streamlined document assembly** — We have consolidated the steps necessary to initiate a document assembly session into one composite window to simplify and expedite the overall document assembly process. Click the **Help** button on the **Starting Document Assembly** window for additional information on how to use this feature.

- **Print various lists and reports** — You can print client lists, case data sheets, labels and QuickText reports from information drawn from the ProDoc client and case database. ProDoc also allows you to print blank forms, form lists, questions lists and form worksheets from the volume libraries to which you subscribe.
- **Print labels** — ProDoc has the ability to print mailing labels from information in your client and case database.
- **Export client and case data** — You can export your client and case database information for use by other law office automation software systems.
- **Custom Fields** — Several user definable fields have been added for both contacts and cases to allow you to track additional information you want such as client social security numbers and cause numbers for cases.

We believe that you will be amazed at the simplicity and efficiency with which our software creates your legal documents. We are committed to developing the finest document assembly system available. We welcome your comments and suggestions so that we can continue to improve ProDoc with the features you need.

## About ProDoc

ProDoc begins document assembly by asking a series of questions, then using the responses to determine the clauses and paragraphs to use in the final document. Following these questions, the form itself is shown, displaying finished legal language and all data completed to this point. Finally, users answer questions to enter the data in the remaining blank fields to complete the document. What you do not see is the complete logic the computer is processing in order to determine which questions need to be asked, skipped or answered automatically. It also renumbers all paragraphs and inserts proper gender pronouns. This system goes far beyond the simple "merge" systems that do nothing more than fill in the blanks.

The logic built into ProDoc is very extensive and results in an extremely efficient operation that asks all the questions that need to be asked while skipping the ones that do not apply to the transaction. In fact, many times the program will be able to determine the proper answer without even having to ask you. Information input for a particular client and case is saved for automatic use in subsequent document preparation for that client's case. Also, some information may always or nearly always be the same, e.g. attorney's name, address, signature block, etc. This information can be set as defaults to automatically appear whenever they are called for in any document.

ProDoc generated documents may be changed or customized. The master forms that contain the standard wording and clauses can be permanently edited by using your word processor. That way, you can insert your own customized wording to be included in the documents every time. Additionally, after a document is created by the system, you can use your word processor for the final editing and printing.

ProDoc was designed to be a versatile tool that can change and grow with your law practice and with the times. Its design allows you to build an entire library of volumes containing the documents you need most in your office. There are four types of information contained in each volume:

- **Master Forms** (templates) which are files containing the text and codes ProDoc uses to create the shell of your document.
- **Data Files** containing instructions telling ProDoc which questions to ask and what to do with your answers. ProDoc merges data and answers to the questions in the master forms to create a finished document.
- **Help Files** with explanations and information to help you use ProDoc.
- **Supplemental Forms** (templates) and **Supplemental Questions** are created by you to extend the power of ProDoc. They work just like the master forms in the volumes which you purchased,

but cover the specific areas you need for your legal practice. Appendix D 221 details the procedure for creating supplemental forms.

## How ProDoc Assembles Documents

ProDoc uses master forms (templates) which contain standard document text clauses that go into the finished document. These master forms also include special character strings (called tokens) which tell ProDoc how to assemble the document and which questions to ask during the assembly process. Master forms for each volume library are stored on your hard disk in a subdirectory under the main ProDoc directory. It is possible to customize master forms using WordPerfect or any other word processor which can read and write documents in the WordPerfect format. Information on customizing master forms can be found in chapter 3 of this manual.

ProDoc goes through five separate steps in the process of preparing your documents.

1. **Transaction Setup -** In this step, you select the volume you want to work with, select the master forms you want to assemble completed documents for, specify whether you want to view the document during the merge or fill-in-the-blank phase, tell ProDoc whether to save your answers, and specify where to save the documents after they are prepared.
2. **Assembly Questions -** In this step, ProDoc asks questions that allow the program to assemble an intermediate document from the master form. The questions are asked using logic programmed by the ProDoc development staff. This logic instructs the program to skip irrelevant questions, offer preset default answers, copy prior answers, assign answers based on logic, or perform other time saving functions.
3. **Intermediate Document Creation** - In this step, ProDoc takes the answers you entered in the assembly questions and deletes or inserts clauses and paragraphs to create an intermediate document.
4. **Merge Phase Questions** - Also called filling-in-the-blanks. In this step, ProDoc asks questions whose answers will be inserted into the document or used to calculate other text to insert. For instance, a question might ask for the date of birth of the ward in a guardianship to be entered numerically, e.g. 01/11/99. ProDoc might use this answer to insert the ward's date of birth into a document as January 11, 1999, and might calculate and insert the ward's age. The questions use logic to simplify your work.
5. **Final Document Creation -** In this step, answers to merge questions and text calculated from them is inserted into the final document. The completed final document is saved as a word processor file according to the instructions given by you during transaction setup.

# Chapter 1, Installation and Setup

## Introduction to ProDoc Setup

This chapter will cover the information that you need to install ProDoc on your computer or network. Check the System Requirements and make sure that your computer meets the minimum standards for performance. If your computer does not meet these standards, you will need to upgrade or purchase a new computer before using ProDoc. Follow the installation steps carefully and you will have ProDoc up and running in no time at all.

## System Requirements

ProDoc can be installed to any desktop or laptop computer meeting the following requirements. It can be installed on either a client/server or peer-to-peer network and accessed through desktop shortcuts on individual workstations. Offices installing ProDoc on a network are encouraged to read **Appendix A** 195 of this manual.

You will need the following resources to run ProDoc with acceptable performance:

### Hardware Requirements

An IBM®-compatible computer with at least 1 GB of RAM, a CD ROM drive, and a local hard disk drive (or network disk drive) with sufficient space to install and run ProDoc and the volumes. A monitor is required with a resolution of at least 1024 x 768 pixels. A Network Interface connection is required with a throughput of at least 1 Gbps for local network and high speed internet connection.

### Operating System Requirements

Microsoft® Windows® 2000, Windows XP, or Windows Vista with all service releases and service packs.

### Word Processor Requirements

In order to edit, save and print completed documents using ProDoc and SOS, a separate word processing program is required. Select either Corel® WordPerfect® 12 (or newer) or Microsoft Word® 2003 for Windows (or newer) with all service releases and service packs.

### Stand-alone or Networked

ProDoc can be installed to any desktop or laptop computer meeting the above requirements as a stand-alone program. It can also be installed on a server or host computer on either a client/server or peer-to-peer network, and the program can be used from shortcuts on client computer desktops.

### Backup Tape Drive

It is very important that you use a tape drive to backup ProDoc files. You may use other forms of media to backup ProDoc, but we believe that it is in your best interest to get a tape drive for backups if you do not already have one.

## Installing ProDoc

**Networked Law firms should first read Appendix A 195, and then install ProDoc on their network server, paying particular attention to "network install note" annotations that appear during the installation process.**

**NOTE:** These steps pertain especially to a new installation. Users updating an existing ProDoc installation will see somewhat different windows.

## INSTALLATION INSTRUCTIONS

**Step #1 -** Insert the CD into your CD-ROM drive.

**Step #2 -** Installation will normally start automatically. If not, see the **Quick Start Guide** in the CD shipping folder for help with beginning the installation process.

**Step #3 –** Opening Screen

Click **Next** to begin the installation.

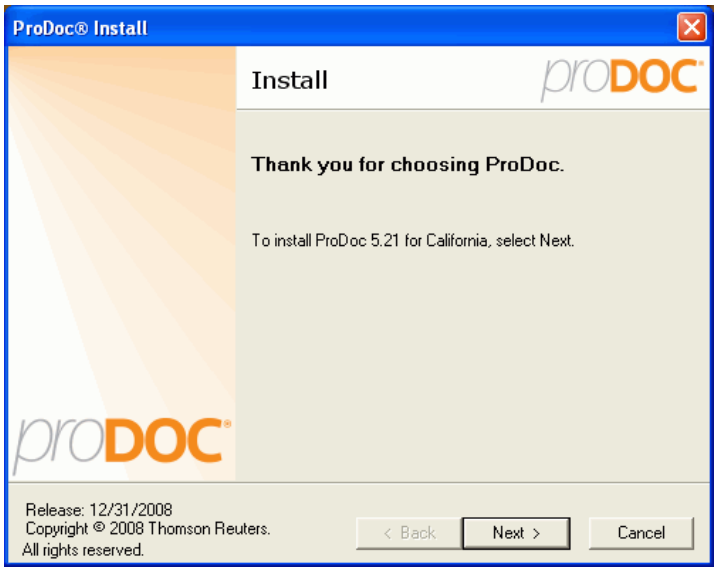



Figure 1-1, Installation Start Window

**Step #4 -** Enter Key Code

Setup will update or install ProDoc and volume libraries in accordance with a unique installation key code. Enter your unique **Key Code** and then click **Next** to continue the installation.

ProDoc® Install
Enter Key Code
proDOC
We will install or update ProDoc® products according to your unique installation key code.
Please enter the installation key code.
Installation Key Code
0000 - 0000 - 0000 - 0000 - 0000
Note: It is strongly recommended that you exit all Windows programs before running this installation.
For further assistance, please call Technical Support at (800) 759-5418.
Release: 12/31/2008
Copyright © 2008 Thomson Reuters.
All rights reserved.
< Back
Next >
Cancel

Figure 1-2, Installation Key Code entry window

**Step #5 -** Accept or reject End User License Agreements

The **ProDoc End User License Agreement** window appears. Read the license agreement. You can scroll through it with the scroll bar on the right side of the window. Click the appropriate button to indicate whether you accept or do not accept the terms of the agreement.

If you are subscribing to a volume containing state bar licensed forms, the state-specific **State Bar License Agreement** window appears. You can scroll through it with the scroll bar on the right side of the window. If you accept the agreement, click the **Accept** button. If not, click the **Do NOT Accept** button.

**Step #6 -** Confirm products to be installed

Figure 1-3, Select Product(s) to be Installed Window

A window like the one shown in Figure 1-3 confirms which products will be installed per the installation

key code you entered in step #4. Although it's not recommended, you can deselect or select individual volumes if desired. Normally, just click **Next** to continue the installation.

**Step #7** – Verify installation location and network settings

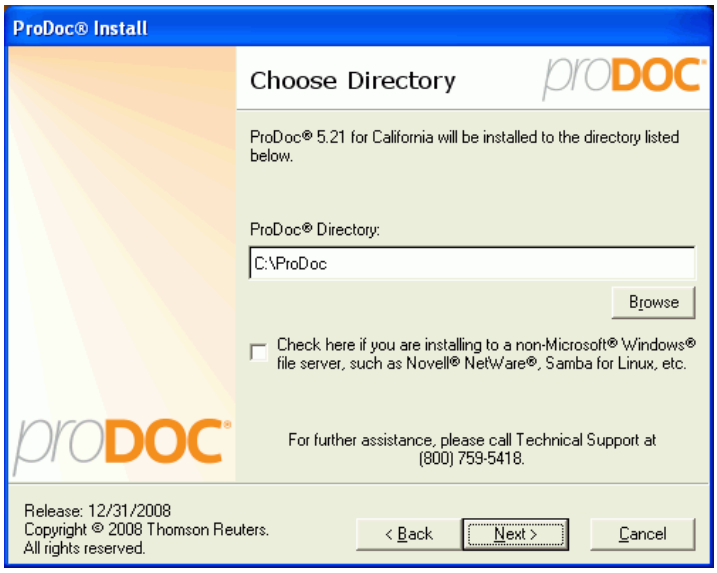

ProDoc® Install
Choose Directory
proDOC
ProDoc® 5.21 for California will be installed to the directory listed below.
ProDoc® Directory:
C:\ProDoc
Browse
Check here if you are installing to a non-Microsoft® Windows® file server, such as Novell® NetWare®, Samba for Linux, etc.
For further assistance, please call Technical Support at (800) 759-5418.
Release: 12/31/2008
Copyright © 2008 Thomson Reuters.
All rights reserved.
< Back
Next >
Cancel

Figure 1-4, Installation Destination Window

A window similar to Figure 1-4 appears. If the installation program doesn't detect a network, the suggested default installation location is the C:\ProDoc folder. We recommend you use the default setting. If you wish to change this, type the path and folder name or click the button next to the field to browse to the folder you wish to use. If the installation folder doesn't exist, the installation program will create it for you.

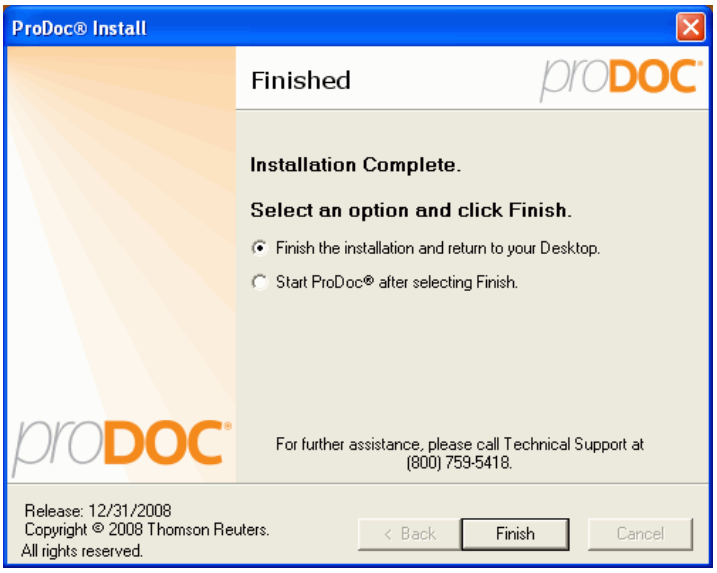
If the program detects a network, it will suggest a network drive for installation. See **Appendix A** 195 of the software manual for detailed information on installing and using ProDoc on your network.

If you intend to use ProDoc on a network drive and the network file server is a non-Windows server, such as Linux, Novell, etc., click the box as indicated. When you are finished, click the **Next** button.

**Step #8** – Selection of "Add In" features

This window provides you an opportunity to select which optional features to install. Click the **Help** button for additional information. Then, click **Next** to continue the installation.

**Step #9** – Finish Installation




A window appears which displays the status of the installation process. When it is complete, a window appears similar to Figure 1-5 indicating the installation is finished. Select the option you want by clicking the button next to the selection; then click the **Finish** button.

Figure 1-5, Installation Finished Window

Your ProDoc program installation is complete. You will find a ProDoc icon on your desktop and in Window's Programs/ProDoc group. You can run ProDoc by double-clicking the ProDoc icon on your desktop. You can also click the **Start** button, go to the **ProDoc program group** and click **ProDoc.**

## Registration and Setup

When you first run ProDoc, the **ProDoc Registration** window will appear. You will only need to register ProDoc once, immediately after installation. When you install periodic updates, your registration will be automatically extended. The sections below correspond to the buttons available on the window. We recommend you use the steps below to register now.

**Register**

1. Carefully enter your 24 digit registration code. This code is printed on your Shipping Advice and Invoice. If you don't have the code, you can call **1-800-759-5418** for help in retrieving the code. Click the **Register** button.

   **(if available)**

   a. If you entered the correct code, **ProDoc will check your computer for an active Internet connection. If one is found,** you will see a window displaying your **Firm Name** as it appears in our records.

   b. If you see an error message instead, click **OK,** carefully enter the code again and click **Register.**

   c. **If your computer cannot connect to the Internet, you will see a window telling you that you can try again or register by fax. Click the OK button to return to the ProDoc Registration window, which will now display the Register by Fax 12 button along with the others. Follow the steps listed in the Register by Fax 12 section below.**

2. The next window displays your **Firm Name** as it is listed in our records. If the firm name isn't correct, you can change it at this point. After the firm name is ready, click the **Continue** button.

3. The **Confirm Firm Name** window appears. This window provides an opportunity to make changes to your firm name. If it is correct as shown, click the **This is My Firm Name** button. If not, click the **Change Firm Name** button, make necessary changes, and click **Continue** to

return to this window.

4. A window will appear informing you that your registration process is complete. Click the **Continue and Run ProDoc** button to exit the window.

**(If available)**

**Register by Fax.** You can only use this option if you **don't** have an Internet connection. If you do, the **Register by Fax** button will **not** appear.

1. Click the **Register by Fax** button. The **ProDoc Fax Registration** window appears.
   a. Enter your registration code.
   b. Enter your **Firm Name** (or confirm it if you are a present user). This name will appear on all of your documents, pleadings, etc. that you produce with ProDoc.
   c. Enter a **Contact Name, Fax Number** and **Phone Number** in the appropriate fields.
   d. When you are sure the above entries are correct, click the **Print Fax Instructions and Continue** button.
2. The **Confirm Firm Name** window appears. This window provides you one more opportunity to make firm name changes. If it is correct as shown, click the **This is My Firm Name** button. If not, click the **Change Firm Name** button, make necessary changes, and click **Continue** to return to this window.
3. You will be prompted to print a form to fax to us. This form contains information that we need to know in order to register your software.
4. After you print the form, a window will appear informing you that you've completed the first part of the process. ProDoc will be temporarily registered for 15 days. Click the **OK** button to close the window. Fax the form to us at 1-866-306-2697. We will send you a confirmation code by either fax or mail.
5. At this point, each time you open ProDoc, the **Complete the Registration Process** window will open prior to login. To open the window after ProDoc is already running, click **Tools → Registration → Register ProDoc.**
   a. Enter the confirmation code in the displayed fields. If you still do not have your confirmation code, you can click the appropriate buttons to re-print the fax instruction sheet, register later, or exit without registering. If you have an internet connection, you can click the **Register (Recommended)** button to register over the Internet.
   b. After entering the confirmation code, click the **Complete Registration** button. A window will appear telling you the registration process is complete. Click the **Continue and Run ProDoc** button.

**Register Later and Run ProDoc.** If you choose this option:

- A window will appear informing you that a temporary registration has been created for you which will expire in 15 days.
- The **ProDoc Registration** window will appear each time you run ProDoc for the next 15 days to help you register. To register while you are working in ProDoc, click **Tools → Registration → Register ProDoc** and use the steps in the **Register** 11 section above.
- If you don't register within 15 days, you will only be able to use ProDoc after you register the software.

**Exit ProDoc without Registering.** If you choose this option, the registration window will appear each time you run ProDoc. After you register, it will no longer appear.

**Setup Windows.** After you select your choices for registration, other windows appear to help you tailor

the installation to your needs.

- **Logging In.** The program will ask you to enter login initials or name. Type your initials or login name (depending on your preferred method) in the field provided. Your initials or login name can be up to 20 characters long. Since this is the first time these initials have been used, a message box will appear stating that you have not logged in with these initials before and asks if you want to log on. Click **OK** to use the initials. Click **OK** again and ProDoc will activate.
- The first user who logs in is designated as the Supervisor. Supervisors will see a **Customize** menu item called **Manage Users Login** and can designate other users as Supervisors or Users. This function is fully discussed in the **Manage Users Login** 13 section.

**(If available)**

- The **Options and Settings** window will appear, displaying the **Firm Information** box. It will display your **Firm Name** differently depending on whether or not you have registered your software. **Please note that you cannot change the Firm Name at this window.**
  - If you have not yet registered, the **Firm Name** will appear as **Unregistered User. When you register, you will designate your firm name.**
  - If you have already registered, your firm name will appear as you entered it during registration. **If you need to change your firm name in the future, click Tools → Registration → Change Firm Name.**
  - Enter your firm's information in the appropriate fields. The required entries are **Firm Name (completed for you)**, the first **Address field, City, State, Zip Code** and **Phone.** We recommend that you also complete any other fields which apply to your firm. The information you enter will appear on many of your documents.
- Another window appears offering to install a toolbar in your word processor. We recommend you click the **OK** button. This will make it much easier to work with documents in both ProDoc and in your word processor. You can remove it or reinstall it later in the **Customize → Options** menu. If you choose to install the toolbar, simply follow the prompts in succeeding windows.

## Manage Users Login

The first person to sign on and run ProDoc will be added to the Staff file as the only supervisor. Supervisors are able to view and use a menu choice under the **Customize** menu titled **Manage Users Login**. From this menu, the supervisor can add, change or delete user records and specify default settings for new users.

Click **Customize → Manage Users Login** to display the **Browse Users Records** window (Figure 1-6).

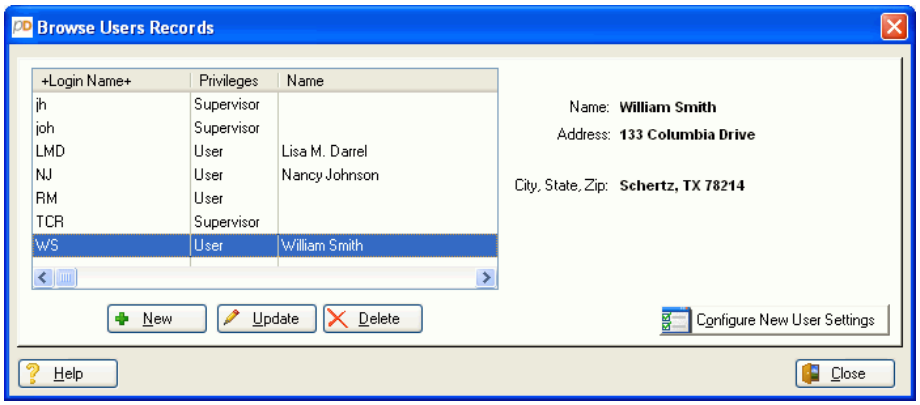



Figure 1-6, Browse Users Records Window

This window displays all users who have logged in previously to ProDoc, along with their privilege level and name (if entered). If the information has been entered, the highlighted user's name and address are displayed on the right side of the window. Buttons and their functions are described below:

**New -** Click this button to add a user, the user's privilege level, and name and address data. You must enter at least a login name. If you enter no other information, the privilege level will default to **User**.

**Update -** Click this button to edit any of the above information for the highlighted user.

**Delete -** Click this button to delete a user. A confirmation window will appear. Click the **OK** button to delete the user or the **Cancel** button to keep the user. You can right click a user name and click the **New, Update** or **Delete** selections on the pop-up menu to perform the same functions.

**Configure New User Settings -** Click this button to specify default personal settings for new users. A confirmation window will appear which states that settings for existing users will not be affected. To continue to the settings window, click the **Yes** button. To stop, click the **No** button. If desired, you can specify initial personal settings for document assembly, completed documents and WebUpdate. Settings for Word Processor, Graphic Forms and Miscellaneous Personal Settings categories cannot be changed; these links on this window are inactive. Individual users can change these settings later if desired. Click the **Help** button on each setting window for more detailed help. An explanation of these settings is available at the following links: **Assembly Settings** 63, **Completed Documents Settings** 65 and **WebUpdate Settings** 67.

## Compatibility Mode

If a program will not run under Microsoft Vista or Windows XP, these operating systems attempt to run the program so that it thinks it's operating under a compatible operating system in an effort to make the program work. For example, if a program's compatibility mode is set to Windows 98, these operating systems will try to make the program think it is running under Windows 98.

ProDoc should not be run in a compatibility mode and, in fact, will not run properly in the compatibility modes for Windows 98 or ME. Thomson Reuters products run well on all versions of Windows 98 and later versions of Windows. On computers with Windows Vista or XP, all compatibility mode settings should be turned off.

### Shutting Off Compatibility Mode

There are two ways to turn off the compatibility mode for ProDoc on your computer. You may shut off the compatibility mode with Windows Explorer or through ProDoc's shortcut on your desktop.

To shut off the compatibility mode using Windows Explorer:

1. Open Windows Explorer.
2. Scroll to the ProDoc folder and open it.
3. Locate the **Prowin.exe** file and right click it.
4. From the menu that appears, click Properties.
5. On the **Properties** box, click the **Compatibility** tab.
6. In the section titled Compatibility Mode, make sure the box next to **Run this program in compatibility mode for:** is unchecked.
7. Click OK.

To shut off the compatibility mode through ProDoc's shortcut:

1. On your desktop, locate the ProDoc icon and right click it.

2. From the menu that appears, click **Properties.**
3. On the **ProDoc Properties** box, click the **Compatibility tab.**
4. In the section titled **Compatibility Mode,** make sure the box next to **Run this program in compatibility mode for:** is unchecked.
5. Click OK.

**NOTE:** If you are running ProDoc across a network, you must make compatibility changes to the computer on which Prowin.exe is installed because this is the only computer on the network that can set a compatibility mode for Prowin.exe. If you try to access the compatibility mode feature from a computer that has a shortcut pointing to the network drive on which ProDoc is loaded, your compatibility settings will be disabled.

# Chapter 2, Assembling Documents

## Assembling Documents

### Overview

This chapter guides you through a document assembly session step-by-step to illustrate the basics of the document assembly process. Keep in mind that simply following the steps outlined here only gives you a small portion of the power, productivity and efficiency of ProDoc. Refer to Chapter 3 for additional details about the ProDoc software's various menu driven features.

**NOTES:** The process described here primarily addresses the assembly of typical non-graphical forms. The graphical forms assembly process differs somewhat. Please click the **Help** button on applicable assembly windows for assistance.

The screen figures in this chapter are typical of what a Windows user with ProDoc installed on a local hard drive sees.

This chapter has been written for new and existing customers alike. So, many of the screen figures depict accurate information, typical of what you will encounter.

## Document Assembly Wizard

ProDoc also has the **Document Assembly Wizard** to help you start assembling documents. This tool is geared towards new users and helps them assemble documents easily by taking them through a document assembly session step-by-step. If you want to use the **Document Assembly Wizard**, click **File → Document Assembly Wizard**. If you are currently using the ProDoc Quick Start Assistant, you may start the **Document Assembly Wizard** by selecting the **Documents and Forms** tab and clicking the **Create Documents Using Wizard** button.

## Document Assembly Menu

Start ProDoc from the Windows 98/ME/NT/2000/XP/Vista Start button or from the ProDoc shortcut icon on your desktop. Users will be asked to log on with their initials in order to recall their unique ProDoc operating preferences. Chapter 3 discusses this configuration at greater length.

### Select Assemble Documents

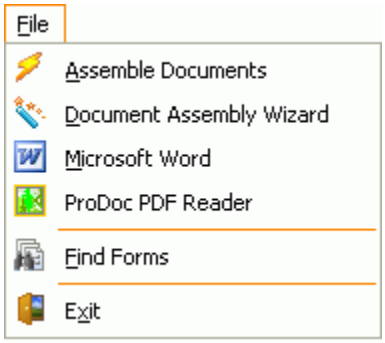



Figure 2-1, Assemble Documents Menu Choice

To begin assembling documents, click **File → Assemble Documents** or click the **Assemble** icon,

, on the left side of the toolbar.

## Phase 1 - Establish Assembly Settings

The **Starting Document Assembly** window appears, shown at Figure 2-2. This window is used to start an assembly session. It lets you specify which case file to use, which forms to assemble, where to save completed documents, and which default answer set to use.

Note the flat blue button at the bottom of the window. You can click it to contract the window to only reveal Steps 1 and 2, or click it again to reveal all four steps. In later assembly sessions, you may wish to skip Steps 3 and 4. ProDoc remembers your choice when opening the window again.

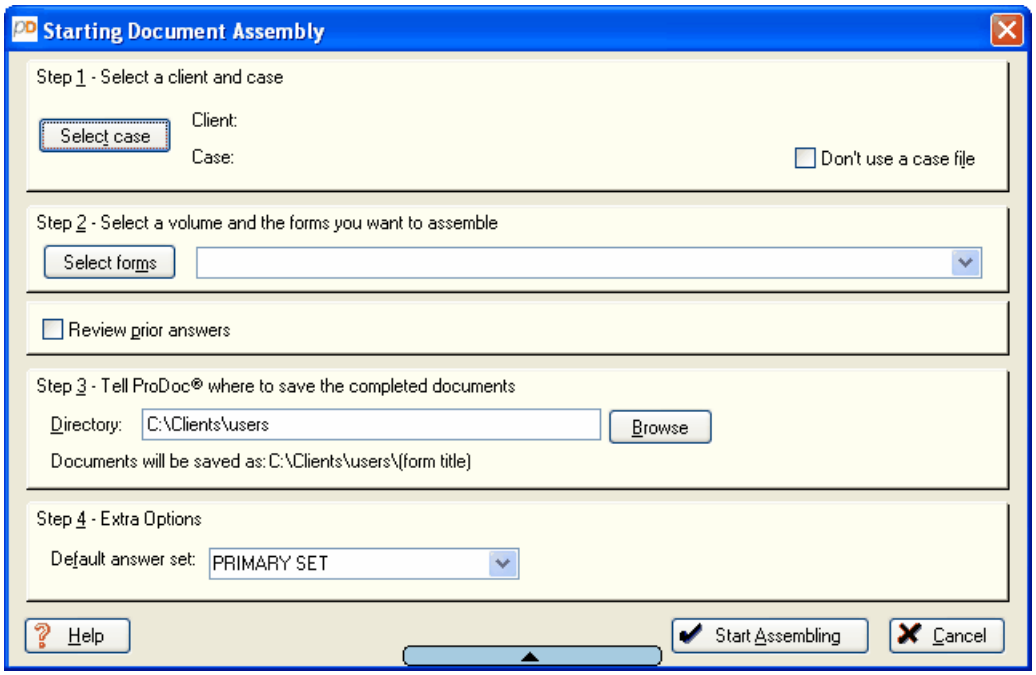



Figure 2-2, Starting Document Assembly Window

**Step 1 - Select a client and case** for storing your answers.

**If you are a new customer and have no clients/cases entered, you should see Step 1A and Step 1B 19, then return here.**

The ability to use case files for each client and case is one of the most powerful features of ProDoc. Answers you provide for clients/cases are automatically saved for use with documents you assemble later. This feature is described in detail in Chapter 3 of the software manual. We strongly recommend you **do not** check **Don't use a case file** for the following reasons:

- If you use a case file, ProDoc saves the answers you enter with the case. During subsequent case assembly sessions, these answers are displayed as defaults. This not only prevents re-typing; it also ensures consistent information entry when an item of information, such as a name, appears in more than one document.
- If you use a case file, you will have the option to save time by not reviewing answers to questions you answered during a previous assembly session using the same case.
- Timeslips users must use case files in order to generate slips from ProDoc as discussed in Appendix C 208 of the software manual.
- Lastly, using a case file makes it easy for you to organize your assembled documents by client

and/or case. You'll have a record of all documents prepared by case, and you can easily open the documents in your word processor.

Due to the above, we recommend you click the **Select case** button to open the client and case selection window, Figure 2-3.

**NOTE:** If desired, you can still start your assembly session without client and case by clicking in the box labeled **Don't use a case file**. You will then skip case selection.

The **Select a Case** window lists existing clients and all cases for the clients. Here, you can select cases; see and modify related client/case data; and create new clients and cases.

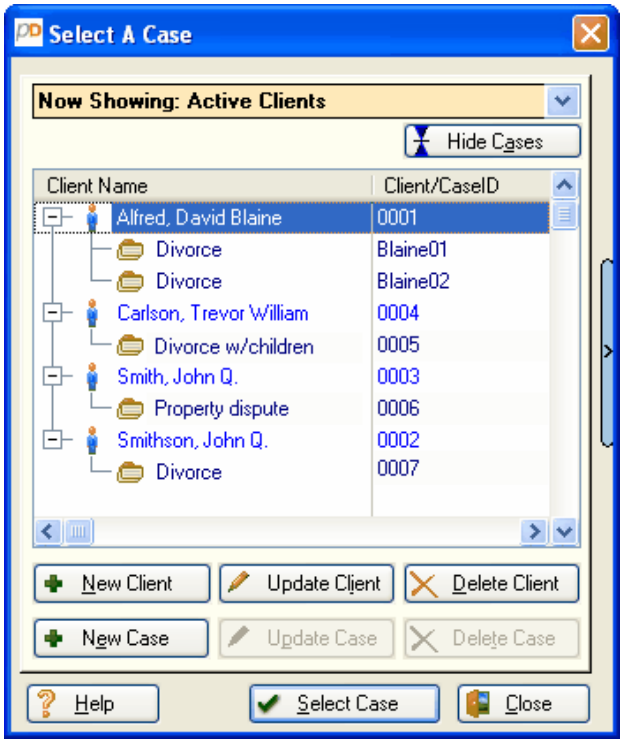



Figure 2-3, Select a Case Window

Figure 2-3 depicts the **Select a Case** window. Note the flat blue button at the right of the window. You can click it to expand the window to reveal client and case details. This is discussed in more detail in Chapter 3.

The client/case list will be blank for new customers until they have added new clients and cases. Then, as in Figure 2-3, it lists all previously entered cases for the selected client.

If you are a new customer with no clients listed, you will want to click the **New Client** button. Scroll down or see Step 1A 19 for more help. After you add the client, you can add a new case with the **New Case** button. Scroll down or see Step 1B 20 for more help. After you add the case, click **OK** to return to the **Select a Case** window.

To select a case for assembling documents, you can double-click a displayed case, or click a displayed case, then press the **Enter** key or click the **Select Case** button. You'll be returned to the **Starting Document Assembly** window, which displays the selected case.

**To find a client/case that's not displayed:**

- Use the keyboard locator. Type the first few letters of the client's last name. As you type, the highlight will move to the next match on the client list. To start over, press the **Backspace** key on your keyboard. If the desired client isn't found, you need to change the category of clients to display as detailed below.
- Use the **Now Showing:** drop down arrow. Cases are grouped under clients. You can choose the types of contacts/clients to display, including all contacts. These will be displayed with type icons of different colors on the window. The default is **Active Clients.**

  All Contacts

  Active Clients (default)

  Closed Contacts

Private Clients

Non-Clients

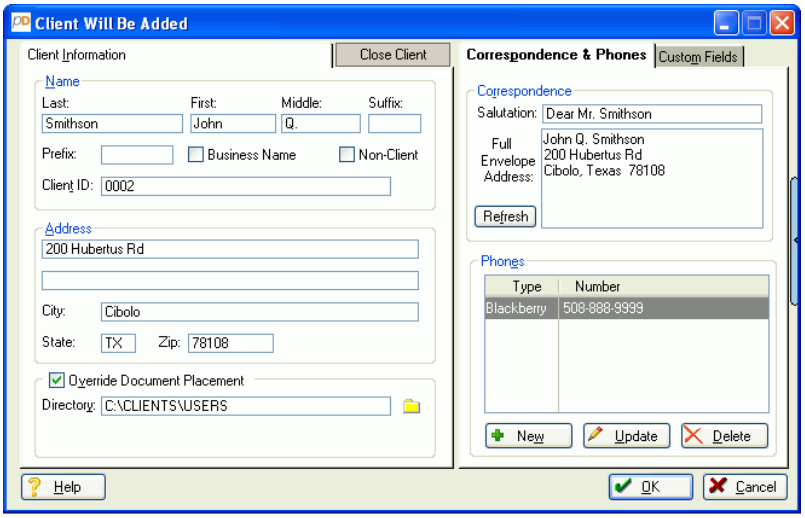
- Use the **Hide/Show Cases** toggle button to display or hide cases. You can use the ⊞ and ⊟ buttons to expand a client list to hide or show cases for the individual client.

Other functions of this window:

- Use the **Update Client** or **Update Case** buttons to perform updates.
- Delete clients and cases with the **Delete Client** and **Delete Case** buttons.
- Expand/contract the window by clicking the blue arrow button on the right side window border. When expanded, the window will display the highlighted client's correspondence and phone information.
- When expanded, you can click the **Send To** button to copy the client's address or name to the Windows clipboard, or to paste the client's address with salutation, address only, or name only to your word processor.
- You can use the **Client Custom Fields** 73 and **Case Custom Fields** 73 tabs to view these fields. If you want to change any information, click the **Update Client** or **Update Case** buttons on the left side of the window.

**Step 1A - Adding a new client (when necessary)**

If the client you want to assemble documents for has not yet been added to the system and you've selected the **New Client** button from the Select a Case window (Figure 2-3) to add the new client to the system, you will see a window (with blank fields) similar to the one shown in Figure 2-4. Notice the three tabs on this window: **Client information**, **Correspondence & Phones** and **Custom Fields.**




Expand/contract the window by clicking the blue arrow button on the right side window border. When expanded, the window will display the highlighted client's correspondence and phone information.

ProDoc will remember your choice and will subsequently open the window expanded or contracted.

Figure 2-4, Client Will Be Added Window

Fill in each field of the Client information tab as shown at the left of the window. Leave the **Override Document Placement** box unchecked to use the default directory you specified in document settings. Only check the Override box to specify a different directory for this particular client.

After completing the information on the left, click the **Refresh** button on the right to copy envelope addresses from the left to the right.

At the right side, add a **Salutation** for correspondence.

Enter phone information on the right side by clicking the **New** button. In the window that appears, select

the type of phone and enter the number in XXX-XXX-XXXX format.

Click the Custom Fields tab to reveal the custom fields entry box on the window, like the one shown in Figure 2-5.

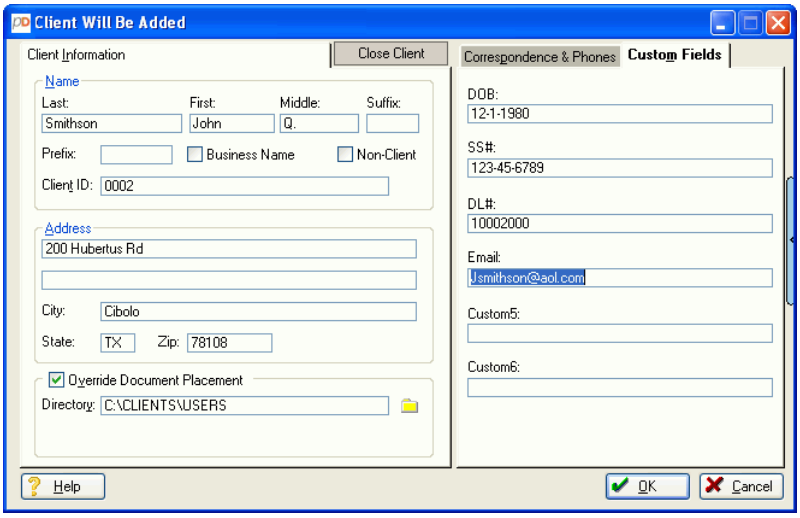



Figure 2-5, Entering Custom Fields

If desired, enter any Custom Fields information for the custom fields you have set up earlier as shown in Figure 2-5.

Setting up these fields is discussed in Chapter 3.

When you are finished, click the **OK** button. Then click the **New Case** button to proceed to adding a new case.

**Step 1B - Adding a new case (when necessary)**

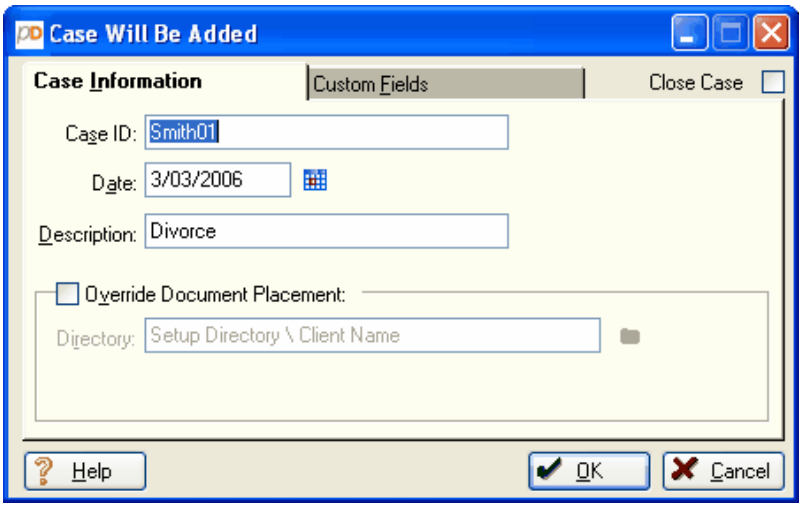



Figure 2-6, Adding a Case

**Note:** If you want to integrate Timeslips with ProDoc, you will need to use Case IDs. Activating Case IDs is explained in Chapter 3.

If you use **Case IDs**, enter the appropriate one here. The ID must either be blank or be a unique set of characters for each case. If your firm doesn't use Case IDs, you can turn this feature off from the **Main Menu**.

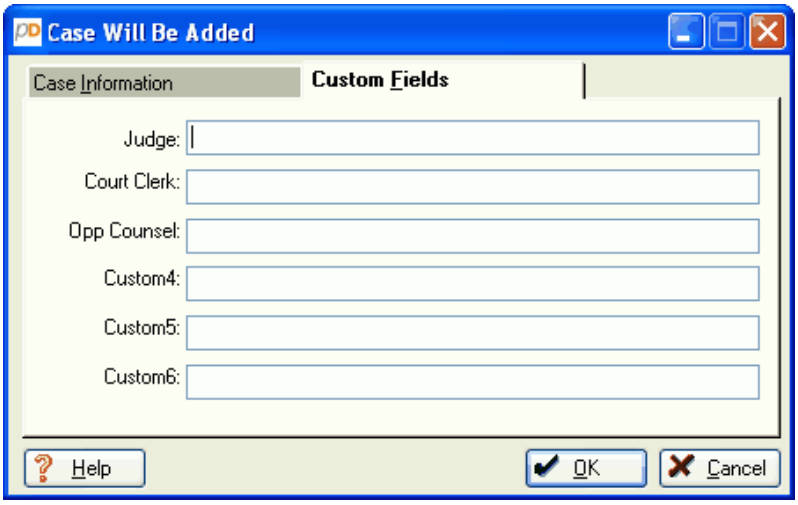
The **Date:** field will default to today's date. You can change the date by typing it in or clicking on the date selection button next to the field.

Enter a unique name or phrase in the **Description:** field to help identify this case. It can be any word, number or combinations. Common uses are short descriptions such as "Divorce" or "Estate Planning".

Only click the **Override Document Placement** and **Directory** box if you want to override the default setting for this particular case. You can type in the path or click the browse button. The Directory Browse Window will appear; use this to find the desired location.

**Filename** - This field will **not** be visible if you chose in setup to have ProDoc automatically "use the form title for filename". Use this field to enter a file name to store all files for the case. Specifying the filename here prevents manually typing it for each document assembly session.

Click the Custom Fields tab if you have set these up earlier and wish to enter appropriate information. A window similar to Figure 2-7 will appear.




In this example, Case Custom Fields were set up which included Judge, Court Clerk, and Opposing Counsel.

Type in the information as needed, then click the **OK** button to return to the **Select a Case** window.

Click the **Select Case** button on that window to use the new client and case for document assembly.

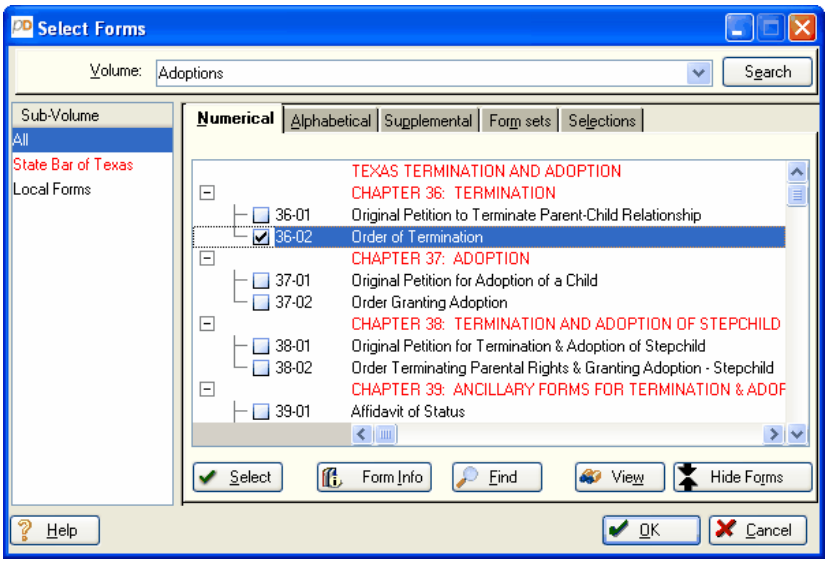
Figure 2-7, Enter Case Custom Fields Window

**NOTE:** If you are finished with adding a new client and adding a new case, you may want to either **go back to Step 1** 17 to review the process for selecting cases, or move on to Step 2 to continue to assemble your document(s).

After selecting the client and case, you will be returned to the Starting Document Assembly window. Client and Case entries are now shown. Proceed to step 2.

**Step 2 - Select a volume and the form(s) you want to assemble.**

If the desired volume is not already displayed, click the **Select Forms** button. A window appears similar to Figure 2-8.




You may select as many forms at one time as desired. When a form is selected, a check mark appears in the box to the left of the title. To select or deselect a form, either click the form title or highlight it and then click the **Select** button. You can deselect it the same way.

Read on for a detailed description of using this window's tools.

Figure 2-8, Select Forms Window

First, select a **Volume** by clicking the drop-down arrow field. A list of all installed volumes will appear. Click the one representing the area of law you want to use.

Use the **Search** button at the top right of the window to open a search dialog window. At that window, you can enter words or phrases likely to be in the forms you want to find. After selecting a form from that window, it will be marked as selected in the Select Forms window.

**Tools for Displaying and Finding a Form.** The tabs across the top of this window provide several unique options:

**Numerical** - Displays forms in numerical order, organized by area of law. This is the default display.

**Alphabetical** - Displays forms in alphabetical order based on their title. The form number appears to the right of the form's title.

**Supplemental** - Shows a window for supplemental forms for assembly for that volume of law. Supplemental forms are forms you create to add to the ProDoc software's forms library.

**Form Sets** - Shows a window for form sets which have been created for that volume of law. Form sets are collections of forms that allow a single item to select several forms at the same time, saving you time in selecting a number of forms in a volume.

**Selections** - Displays forms currently selected for action. The **Clear Selections** button can be used to deselect a highlighted form.

The **Numerical** and **Alphabetical** selections also contain the following options at the bottom of the window:

**Form Info** - Brings up detailed information about the highlighted form.

**Find** - Brings up the find form dialog window to search for forms containing a specific word or phrase.

**View** - Displays the highlighted form with all language inserted and blanks inserted where client/ case information would be located. This feature is useful for viewing a form without assembling it.

**NOTE:** If you need to change to a different volume, click the drop-down arrow field labeled **Volume:** and choose another from the list.

**Tree Control**

The **Numerical** display tab includes a standard Windows tree control which is used to hide and display the forms contained in each chapter of a volume. It can be especially useful when dealing with a very large volume. When you contract the tree, only the chapter headings are displayed. This makes it easier to scroll through the list looking for the chapter you need. After finding it, you can expand that chapter and select the appropriate form.

- To contract the entire form list, click **Hide Forms**.
- To expand the entire form list, click **Show Forms**.
- To contract a single chapter, click the ⊟ box.
- To expand a single chapter, click the ⊞ box.

When you have finished selecting one or more forms, proceed to Step 3.

After selecting your form(s), you can either accept answers you've already entered or review each question and answer. Click the **Review prior answers** box to go over any previously saved answers and make changes before assembling documents. If you leave the box unchecked, only those questions not previously answered will be asked, and the answers previously entered will be used without review.

An arrow button at the bottom of the **Starting Document Assembly** window lets you hide or show Steps 3 and 4, which deal with document location and default answer sets.

**Step 3 — Tell ProDoc where to save the completed documents.**

Normally, you'll want to use the displayed directory, which will be the default settings you chose in your setup preferences.

- The **Directory** field lists the drive and directory where assembled documents will be saved. If you prefer a different directory for these documents, type it in or click the **Browse** button to the right of the box and select the drive and directory from the **Directory Browse** window.
- The **Documents will be saved as:** entry shows the path and confirms whether the actual form title or another name will be assigned.

> **NOTE:** The filename will usually end with **.doc** for Microsoft Word and **.wpd** for WordPerfect, depending on your selected word processor. These settings are discussed in detail in Chapter 3.

**Step 4 - Verify other assembly options.**

The **Default Answer Set** field is provided to let you designate optional default answer sets (discussed in Chapter 3) for this document assembly session.

If you have created any alternate sets, select the default answer set you want to use from this list by clicking the drop down arrow at the right of this field. Otherwise, ProDoc will use your **PRIMARY SET**.

Figure 2-9 provides example entries following the completion of the foregoing steps 1-4:

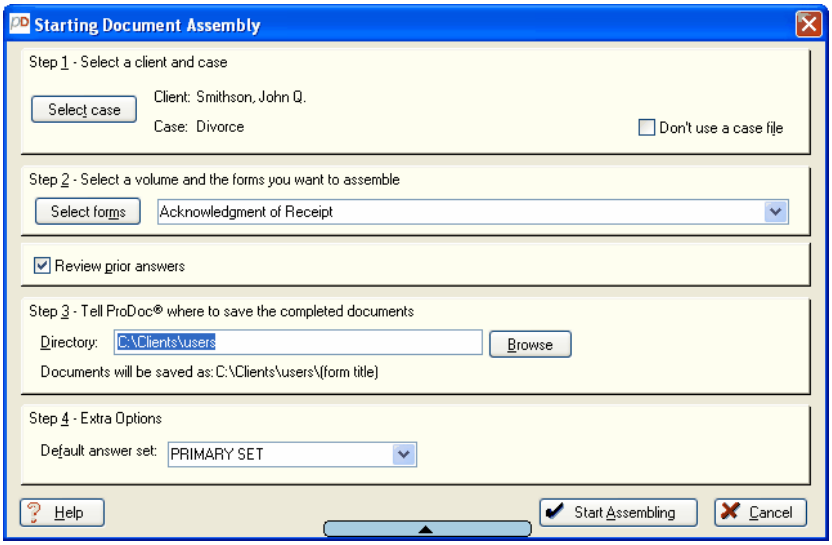



Figure 2-9, Completed Starting Document Assembly Window

Figure 2-9 shows the completed assembly session settings.

Now, you're ready to start assembling. Click the **Start Assembling** button in the lower right hand corner of the Starting Document Assembly window to begin document assembly.

## Phase 2 - Answer "Assembly" Questions

After clicking the **Start Assembling** button, you will see a Volume Banner Screen similar to the one in Figure 2-10.

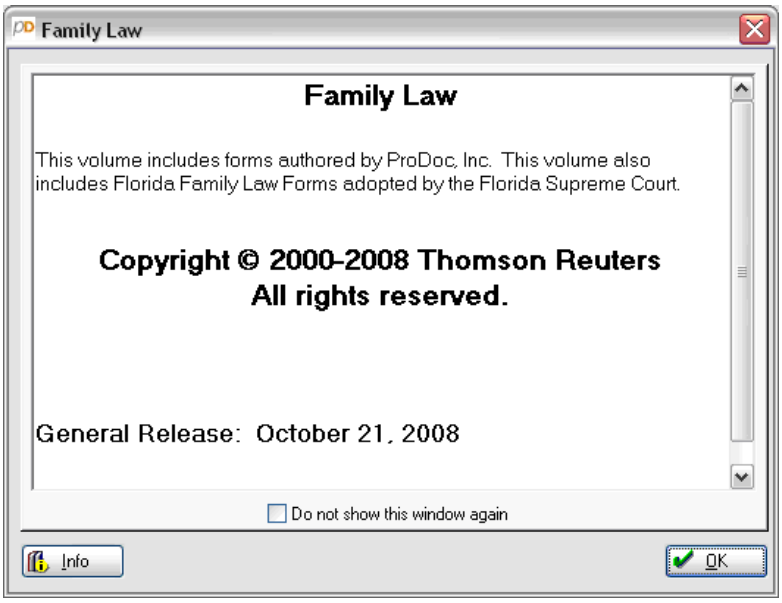

Family Law
Family Law
This volume includes forms authored by ProDoc, Inc. This volume also includes Florida Family Law Forms adopted by the Florida Supreme Court.
Copyright © 2000-2008 Thomson Reuters
All rights reserved.
General Release: October 21, 2008
Do not show this window again
Info
OK

Figure 2-10, Banner Screen

Every Volume has a banner screen to provide information about the volume.

You can read it, choose to get more information on the listed volume by clicking the **Info** button, or click the box next to **Do not show this window again** to avoid seeing it again.

Select **OK** to continue to the next window.

Questions used to assemble your document will be presented in various windows similar to the one shown in Figure 2-11. Note that you can click the flat blue button labeled **Show** or **Hide Explanation** to see or hide an explanation for the question.

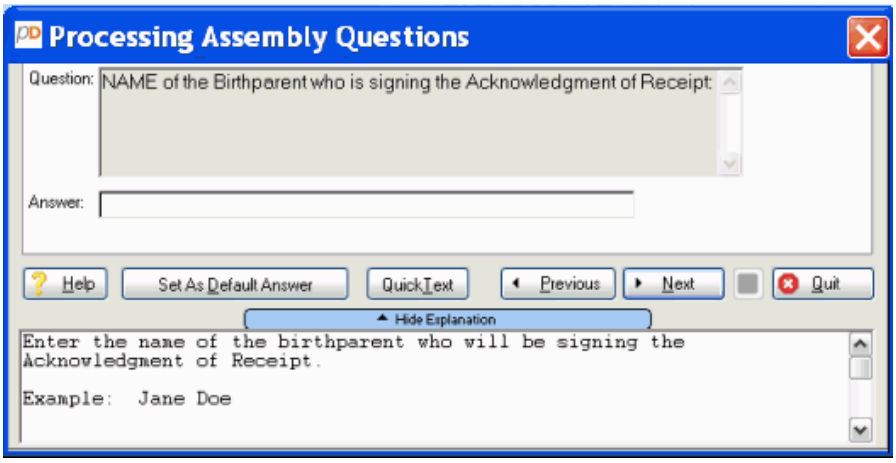



Figure 2-11, Processing Assembly Questions Window

Simply complete the **Answer** field and click the **Next** button to proceed to the next question window.

**NOTE:** The questions are displayed in one of several formats, including Fill-in-the-Blank context, Fill-in-the-Blank non-context, Single and Multiple Choice, Combo, List and Table as follows: (see below)

**Fill-in-the-Blank** questions allow you to simply type in your answer (such as a client's name or street address). They may be presented in either a context or non-context window. Click the **Next** button after you have typed in your answer.

**Single Choice** questions present you with a list of items from which you select only one. To select an item, highlight it, then press **ENTER** or click the **Next** button.

**Multiple Choice** questions present a list of items from which you select any number of items or none at all. To select an item, highlight it, then press **SPACE** or click the **Select** button. You can also use your mouse. When you have made all of your selections, click the **Next** button.

**Combo Questions** present you with a list of likely answers and an entry field. Your answer is the text

that you put in the entry field. An answer from the list is put into the entry field when it becomes highlighted. You are not limited to the answers in the list. You may type whatever you want into the entry field.

**List Questions** are used to fill in answers in lists, and you can add rows/answers, edit answers in previous rows and move rows as needed. One example of this is entering a list of names of minor children.

**Table Questions** allow you to enter answers in rows and columns of a table, selectively edit or delete any entry, and move rows up and down in the table.

**Validation for Answers:** For answers which have special requirements, ProDoc checks the answers against specific criteria to minimize data entry and logic errors. Follow the guidance in the validation window to correct the answer and move to the next answer field.

**Options Buttons.** Depending on the type of question, the following buttons are available:

**Help** - Displays the help topic for the window.

**Set as Default Answer** - Sets the current answer as the default answer for the active question. To use this feature, type in the answer you want to use as a default and click the button. Verify whether or not you want this answer as the default by clicking **Yes** or **No** on the resulting window.

**NOTE:** Several answers taken from **Firm Information** fields are handled differently; click the **Firm Information in Answers** 74 link to see how to set default answers for these items.

**QuickText -** only visible on fill-in-the-blank answers. Click the button to bring up the QuickText window, where you can select one of the entries as the answer to your question. You can always insert QuickText by using the shortcut designated when the entry was created.

**Previous -** displays the previous question.

**Next -** displays the next question.

**Save and Continue -** saves all answers you previously entered and accepted by clicking **Next.** Use this button to ensure your answers are saved in the event of a computer malfunction during an assembly session. Clicking this button does **not** save the currently displayed answer because it has not yet been accepted.

**Quit** - Exit the current question. If assembling a document, this button brings up the session quit options window to determine where to proceed after exiting.

**Show or Hide Explanation -** Provides helpful information about the current question.

**Auto -** will not be available for every window. Selecting this option tells ProDoc to automatically answer this and all remaining questions with the placeholder specified in system **Assembly Settings.** This will create a finished document with the placeholder inserted in all locations where you did not actually enter an answer. Later, you can reassemble the document and fill in the blank answers or replace the placeholders with answers in your word processor. Reassembling is best because it adds saved answers to your case database that can be used in future documents.

# Phase 3 - Answer "Merge" Questions

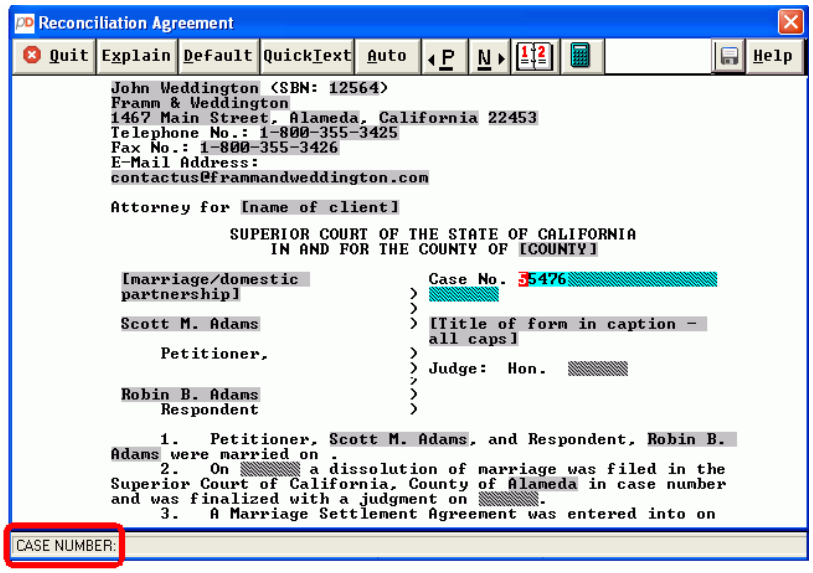

Reconciliation Agreement
Quit
Explain
Default
QuickText
Auto
P
N
Help
John Weddington (SBN: 12564)
Framm & Weddington
1467 Main Street, Alameda, California 22453
Telephone No.: 1-800-355-3425
Fax No.: 1-800-355-3426
E-Mail Address:
contactus@frammandweddington.com
Attorney for [name of client]
SUPERIOR COURT OF THE STATE OF CALIFORNIA
IN AND FOR THE COUNTY OF [COUNTY]
[marriage/domestic partnership]
Case No. 55476
Scott M. Adams
[Title of form in caption - all caps]
Petitioner,
Judge: Hon.
Robin B. Adams
Respondent
1. Petitioner, Scott M. Adams, and Respondent, Robin B. Adams were married on .
2. On a dissolution of marriage was filed in the Superior Court of California, County of Alameda in case number and was finalized with a judgment on .
3. A Marriage Settlement Agreement was entered into on
CASE NUMBER:

Figure 2-12, Context Display Window

Figure 2-12 shows the document after it has been pre-assembled with necessary clauses. You now progress through the document by completing the blank fields with information for the specific client and case.

For each blank, a question is displayed at the bottom left of this window (circled in red). You can also click **Explain** on the menu bar for more help on the question.

Type your answer in the shaded fields and then press **TAB, Alt+N**, or click the **N** button to move to the next field. You will be prompted to enter information in the bottom left corner of your screen as noted in Figure 2-12. After you enter the information in the last field and press **Tab**, ProDoc will close the merge phase and save your document. If you have chosen the option in setup preferences, ProDoc will then open the document in your word processor.

**Validation for Answers:** For answers which have special requirements, ProDoc checks the answers against specific criteria to minimize data entry and logic errors. Follow the guidance in the validation window to correct the answer and move to the next answer field.

A description of controls on this window follows.

**Navigating From Field To Field.** To move forward to the next field:

- Press the **Tab** key,
- Click **N** on the menu bar, or
- Press **ALT + N**.

To move backward to the previous field:

- Press the **Shift + Tab** keys,
- Click **P** on the menu bar,
- Press **ALT + P**.

**Menu Options**

**Quit** - Exit the current document. Brings up the **Session Quit Options** window to determine where to proceed after exiting.

**Explain** - Provides help information about the active question.

**Default** - Sets the current answer as the **default answer** for the active question. To use this feature, type in the answer you want to use as a default, then select **Default** from the menu. This brings up a window to verify you want to set the answer as a default.

**NOTE:** Several answers taken from **Firm Information** fields are handled differently; click the Firm Information in Answers 74 link to see how to set default answers for these items.

**QuickText** - Accesses the **QuickText** browse window to paste entries into the document.

**Auto** - Tells ProDoc to automatically answer this and all remaining questions with the placeholder specified in system **Assembly Settings.** This will create a finished document with the placeholder inserted in all locations where you did not actually enter an answer. Later, you can reassemble the document and fill in the blank answers or replace the placeholders with answers in your word processor. Reassembling is best because it adds saved answers to your case database that can be used in future documents.

**P** - Backs up to the previous field.

**N** - Advances to the next field.

**Save and Continue -** saves all answers you previously entered and accepted by clicking **N** or pressing the **Tab** key. Use this button to ensure your answers are saved in the event of a computer malfunction during an assembly session. Clicking this button does **not** save the current field's displayed answer because it has not yet been accepted.

**Help** - Brings up the help topic for this window.

**NOTE:** Cut, copy, and paste actions can be performed from this window.

## Phase 4 - Saving Documents

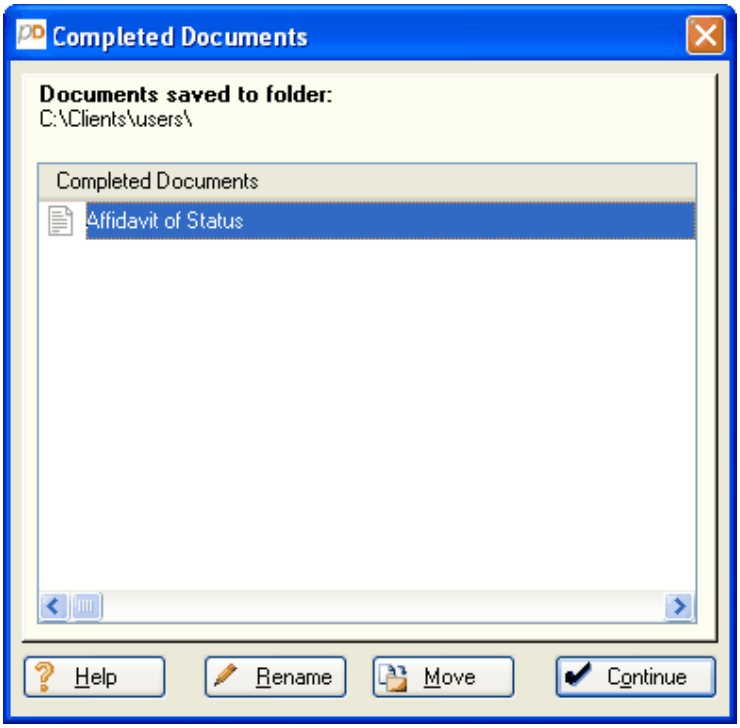



Figure 2-13, Completed Documents Window

After all of your selected documents have been assembled, a Completed Documents window (Figure 2-13) appears with a list of completed documents showing the filenames under which they were stored. Note the filename(s) and file location, then click the **Continue** button.

A **Rename** button is provided should you want to alter any aspect of the document path and name. We recommend that you avoid renaming at this stage of document assembly.

A **Move** button is also available for use if you want to store the document in a different folder than the default.

## Phase 5 - Edit and Save Completed Documents

ProDoc will automatically send the first completed document to your word processor for final review, editing, re-saving and printing.

**NOTE:** Microsoft Word users saving a document will most likely encounter a pop-up window

asking confirmation if you want to save it as a Word document. If you encounter this window, it is best to save the document in Word format in order to preserve the formatting integrity of the edited document. WordPerfect users should do likewise and save in their native version.

If you are using a recent version of WordPerfect or Microsoft Word, ProDoc will insert the document's name into the "recently used files list" at the File drop down menu if you enabled this feature in setup. This makes it very easy to find and open recently saved documents. If you assembled more than one document, you can open successive documents in the same fashion. If you have not enabled this feature in setup, you must find and open the files in the location where you told ProDoc to save your completed documents.

Now that you know how to assemble documents with ProDoc, proceed to Chapter 3 to learn more about how to navigate the program's various menu items and buttons.

**NOTE:** Assembling and printing graphical forms differs from the foregoing procedure. ProDoc uses an entirely different assembly technique which includes sending finished graphical forms to your default PDF reader rather than sending them to your word processor.

# Chapter 3, Main Menu

## The Main Menu

This chapter helps you learn how to navigate through ProDoc by providing a description of the various options and features available from the main screen menu and **toolbar** 29. Figure 3-1 shows the main screen menu on a ProDoc installation on a computer which also has the Small Office Suite program installed.

Figure 3-1, Main Menu

Also, ProDoc has many windows which list information you scroll through, like your list of clients and the list of forms in a volume. These lists are called Browsers because you can browse through the list and make a selection.

Most of the ProDoc software's browse lists include "locator fields". This means when the list is selected, you can simply type the first few letters of the selection you want and ProDoc will instantly jump to it. As you type letters, they are displayed in the locator field (usually located above the top left corner of the list) so that you can see what you have typed. For example, if you want to jump to form "3-16" in the form selection screen, simply type "**3-16**". When you enter "**3**", ProDoc will jump to form 3-1 and the locator field will display "3". As you continue typing "**-16**", ProDoc will jump to form "3-16" and that is what is displayed in the locator field. If you want to jump to a different entry, you will need to clear the locator field. To do this, simply press **Backspace** to delete each letter or press the up or down arrow key once. For example, after you type "**Smi**" to jump to "Smith" you will need to clear the locator field before you can type "**Ada**" to jump to "Adams".

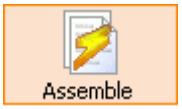
**NOTES:** The screen figures in this chapter are typical of what a Windows 98/ME/NT/2000/XP/Vista user with ProDoc installed on a local hard drive sees.

This chapter has been written for new and existing customers alike. So, many of the screen figures depict accurate information, typical of what you will encounter.

## Toolbar Buttons

Figure 3-1A, Main Menu Toolbar

The ProDoc main window normally has five icon buttons displayed on the main window toolbar. This changes to six buttons if the Small Office Suite is installed, which is the case in Figure 3-1A. If the Small Office Suite program is not installed, then that particular icon will not be displayed. Click the buttons below to get more detailed help. Click the Back Arrow or Contents tab to get back to this section.




Click to begin a document assembly session.

Click to start your preferred word processor (Microsoft Word or WordPerfect). This button switches to or opens your word processor.

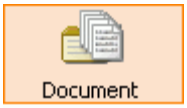
Click to open the **Small Office Suite (SOS)** program if you have it installed. This program can help you:

- Track more detailed information regarding your clients and cases
- Track time and appointments
- Manage billing
- And much more!

To find more information about SOS, please call the Sales Department at **800-759-5418**.

Click to open the **Certified Mailer** program. It interacts with your databases to easily print certified mailer labels.

Click to open the **Client/Case Manager**, a central management area for clients and cases. You can add, change and delete client and case information.




Click to open **Document Manager**, the central document management area, where you can add, change, move and delete completed documents.

## File Menu

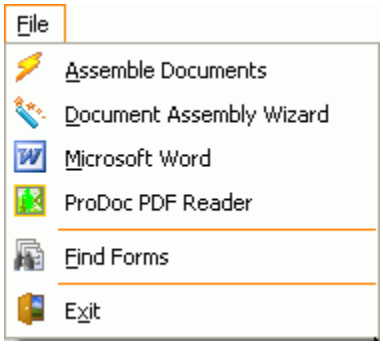



Figure 3-2, Main Menu File Drop-Down Box

**Assemble Documents** starts a document assembly session. This selection performs the same function as the Assemble toolbar button,

. Chapter 2 explains the document assembly process in detail.

**Document Assembly Wizard** takes you step-by-step through the document assembly process. The

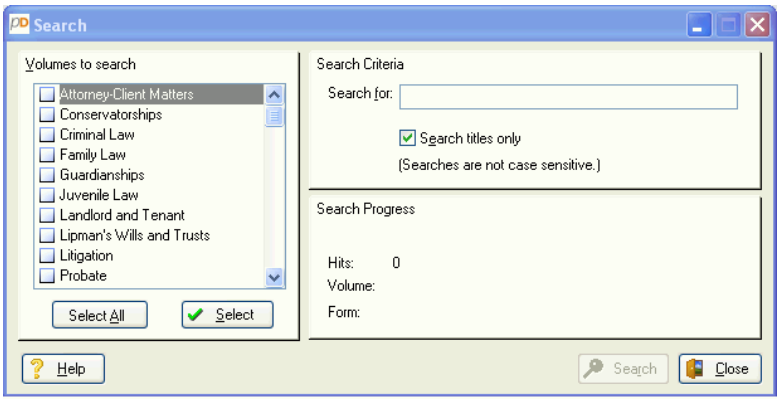
wizard is especially useful for new ProDoc customers because it provides an easy-to-use interface for creating new documents. You may use the **Document Assembly Wizard** in the Quick Start Assistant or by clicking **File→ Document Assembly Wizard** on the ProDoc menubar.

**Microsoft Word** lets you open or switch to your preferred word processor. The word processor that starts (either Microsoft Word or WordPerfect) depends upon which is installed and which you chose during setup. This selection also switches to your word processor if it's open. This selection performs the same function as the Word Processor toolbar button,

.

**ProDoc PDF Reader** opens the ProDoc software's built-in PDF file reading program. This program also has a typing feature for filling in blanks in PDF forms. You can designate this program as your default viewer for all PDF documents and use it to view and print completed graphic documents in ProDoc.

**Find Forms** brings up the form search window shown in Figure 3-3. You can search for forms by typing a key word or phrase in the **Search for:** field. You can search either in specific volume(s) or throughout all volumes.




You must first select one or more volumes from the list on the left by clicking the title, box or the **Select All/Select** buttons. If you cancel the search after one or more matches have been found, you will be asked whether you would like to view a list of the matches found up to that point.

Figure 3-3, Search Window

**Exit** closes ProDoc. If "Auto Backup at exit" is selected in Options and Settings, you will be prompted for a backup choice. If you are running SOS, you'll likely want to backup your files with that program instead of using ProDoc.

## Edit Menu

Figure 3-4, Edit Menu Drop-Down Box

**Cut, Copy** and **Paste** are shown in Figure 3-4. These choices will be available when you are working on a form or document, or when you are entering information into any available text field in ProDoc. These choices will be grayed out when they cannot be used. Each of these selections performs the desired action only on the text you have selected.

**Cut** moves selected text from your document to the Windows clipboard and deletes it from your document.

**Copy** copies selected text to the Windows clipboard.

**Paste** inserts selected text from the Windows clipboard to the cursor position in your document.

## Clients and Cases Menu

Figure 3-5, Clients & Cases Drop-Down Box

**Client/Case Manager** brings up a management window where you can add, delete, search for or select clients and cases as well as modify specific client and case information. This selection performs the same function as the Client/Case toolbar button,

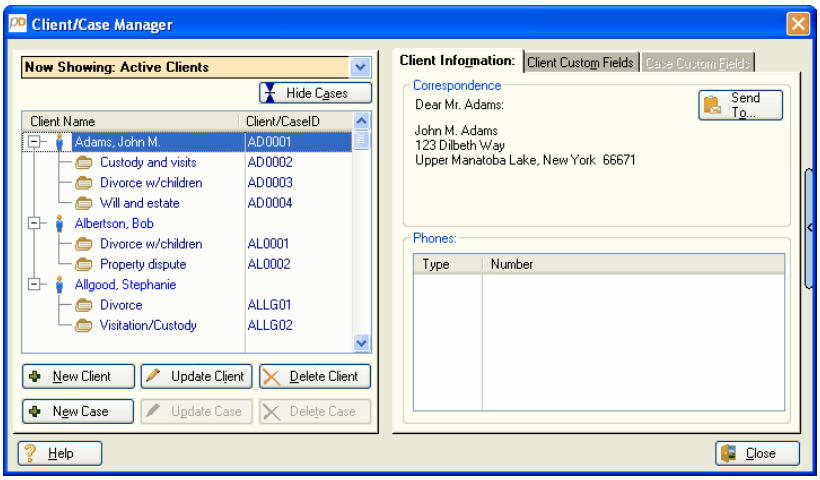
.

One of the most important features of ProDoc is its ability to build a case file for saving your answers. Using this feature allows you to reuse information entered in earlier assembly sessions every time you produce documents for that case. As the case progresses, you find that you enter less and less information in order to produce finished documents. For example, once you enter the county where the suit is filed, dates, names of the parties, addresses, etc., that information is automatically available for subsequent documents and does not have to be retyped. The answers you entered in previous assembly sessions will be automatically displayed as the proposed answer whenever appropriate to the question.

You can have an unlimited number of clients in ProDoc and each client can have an unlimited number of cases. Note: Normally, you will enter new clients and/or cases during a document assembly session as discussed in Chapter 2.

While a case file should normally be created for a single legal matter (such as Estate Planning or Divorce), you are not restricted to using only one ProDoc volume. If necessary, you can assemble documents from several volumes in a single case file.

Clicking **Client/Case Manager** brings up a window like the one shown in Figure 3-6. This window displays the clients you have entered, the cases, phones, correspondence addresses and custom fields for each client and case. It allows you to add, update and delete these items.




The client/case list will be blank for new customers until they have added new clients and cases. Then, as in Figure 3-6, it lists all previously entered cases and clients.

Note the flat blue button at the right of the window. You can click it to expand the window to reveal client and case details or contract it to only reveal clients and cases.

Figure 3-6, Client/Case Manager Window

## Left side of Client/Case Manager Window (visible in both basic and expanded mode)

Clients, cases and unique IDs for each will be displayed alphabetically by last name. The IDs appear only if you have chosen to use these in setup preferences.

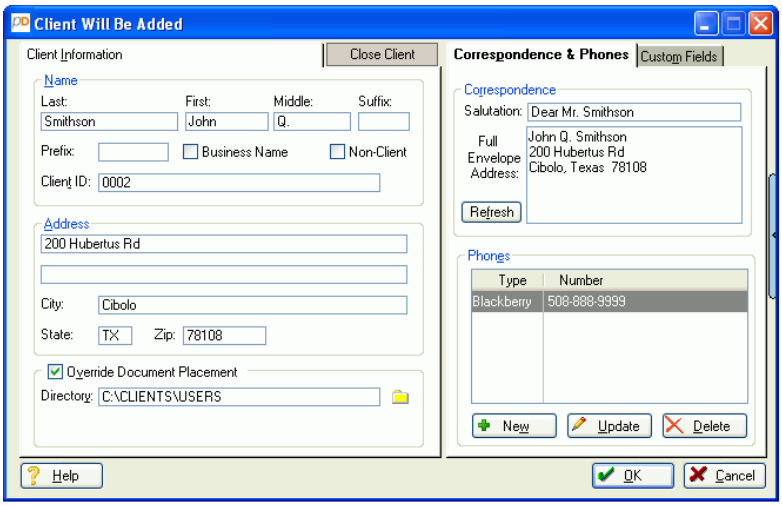
The **Now Showing:** box tells you what types of contacts or clients are displayed. Click the drop down arrow to select the type to display:

- **All Contacts**
- **Active Clients (default)**
- **Closed Contacts**
- **Private Clients**
- **Non-Clients**

Use the **Hide/Show Cases** toggle button to display or hide cases. Click ⊞ or ⊟ to hide or show cases for individual clients. You can drag the vertical line column separator left and right to allow more room for a particular column. You can also use the scroll bar at the bottom of the section to move the column view to the right.

To add a new client or update the information for the highlighted client, click **New Client** or **Update Client**. This brings up the **Client Information Dialog** window where you perform the desired action. You can also double-click a client to update the information for that client. Right-clicking on a client brings up a pop-up menu corresponding with the **New**, **Update** and **Delete** options displayed. You can also click **Delete Client** to remove the client from the system.

When you double-click a client or click the **New Client** or **Update Client** buttons, a Client Information Dialog window similar to Figure 3-7 will appear.




Information is displayed in three tabs: Client Information, Correspondence and Phones and Custom Fields.

To add or edit client information, click the appropriate field or press the **Tab** key to move from one field to the next.

Figure 3-7, Client Dialog Window

The **Client Information** tab of the Client Dialog Window is where basic information about the client is maintained such as shown in Figure 3-7. Most of the information in this screen is self-explanatory, such as name, address, and correspondence. Client ID's are unique letter/number combinations that identify each client (similar to how a social security number identifies a person). If you do not use this feature in your practice, you can turn it off in ProDoc under the **Options** menu as discussed elsewhere in this chapter. When this feature is turned off in ProDoc, the client ID field is not displayed.

**NOTE:** If you will use Timeslips with ProDoc, you should assign Client IDs and Case IDs. You should also ensure your Client IDs are no more than 30 characters long due to Timeslips program limitations on that program's corresponding Nickname fields.

The **Close Client** button will only appear when you are updating an existing client. You can use it to change your client's status. If you are updating a client with a status of closed, the button will be labeled **Re-Open Client**. If you click this button, the client's status will change to open.

**NOTE:** At the bottom of this window is a Directory field which displays the default location where your completed documents will be saved. Leave the **Override Document Placement** box unchecked to use the default directory you specified in the **Customize /Options/Completed Document** settings. Check the box to specify a different directory for this client.

When you click the **Custom Fields** tab, the Custom Dialog window like the one shown in Figure 3-8 will appear. Just fill in the custom fields provided (if any were established by you in system options settings).

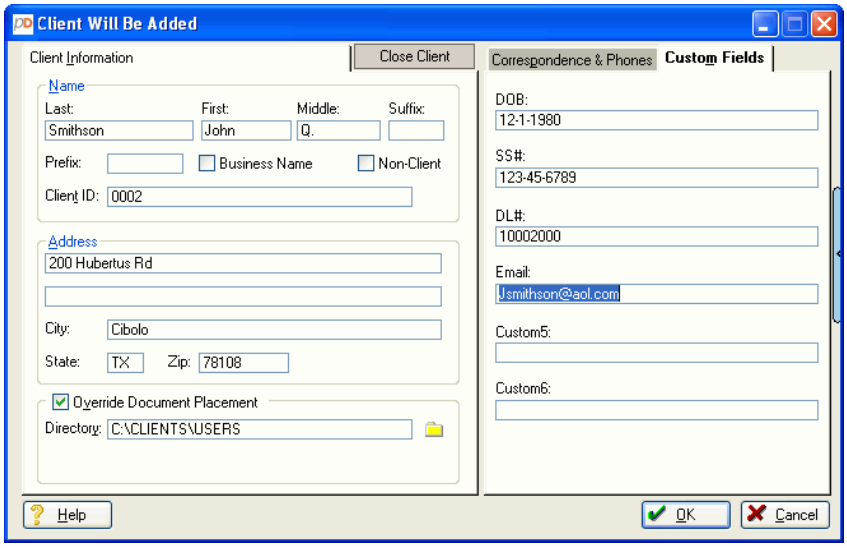



Figure 3-8, Client Custom Fields Tab

The same functions on the left side of the Client/Case Manager Window explored earlier for clients also apply to working with cases. Double-click a case or highlight it and click **Update Case** to reveal the **Case Dialog Window**, where you perform the desired action. Clicking **New Case** also reveals the window. Clicking **Delete Case** removes the case from the system.

When you double-click a case or click the **New Case** or **Update Case** button, a window similar to Figure 3-9 appears.

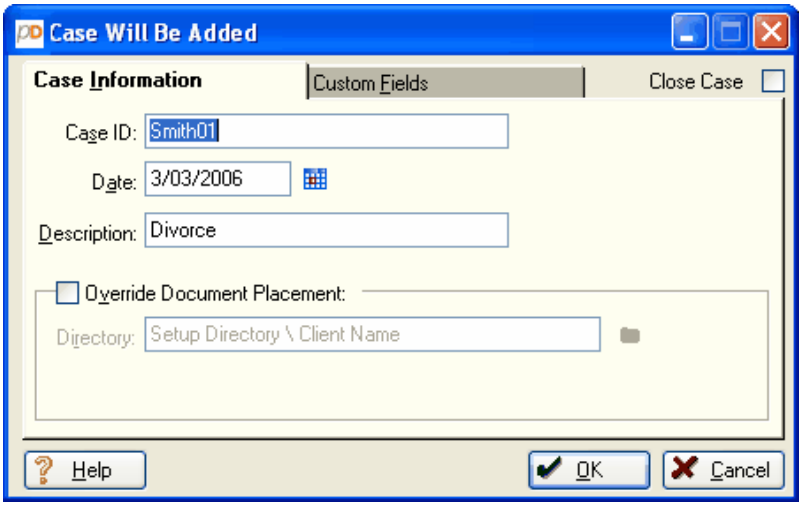



Figure 3-9, Case Dialog Window

If you use **Case IDs**, enter the appropriate one here. The ID must either be blank or be a unique set of characters for each case. If your firm doesn't use Case IDs, you can turn this feature off from the **Main Menu**.

**NOTE:** If you want to integrate Timeslips with ProDoc, you will need to use Case IDs. Activating Case IDs is explained in the **Clients & Cases Settings** 72 section in Chapter 3.

The **Close Case** box will only appear when you are updating an existing case. You can use it to change the status of the case.

The **Date:** field will default to today's date. You can change the date by typing it in or clicking on the date selection button next to the field.

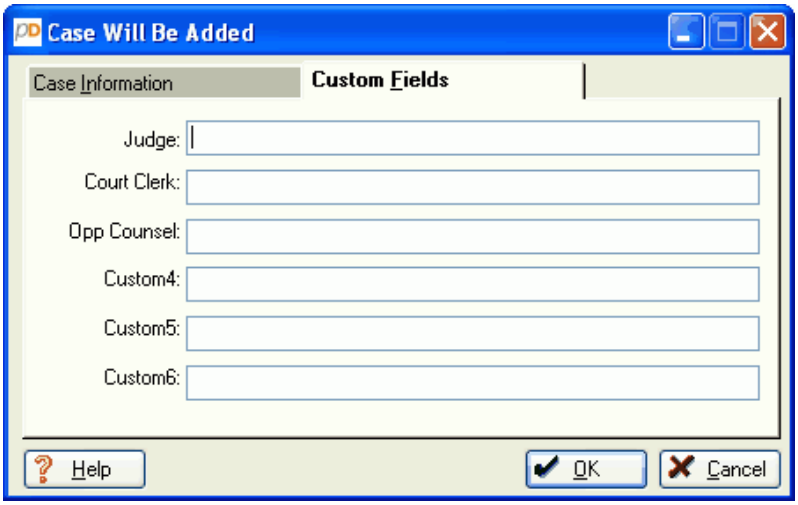
Enter a unique name or phrase in the **Description:** field to help identify this case. It can be any word, number or combinations. Common uses are short descriptions such as "Divorce" or "Estate Planning".

Only click the **Override Document Placement** and **Directory** box if you want to override the default setting for this particular case. You can type in the path or click the browse button. The **Directory**

**Browse Window** will appear; use this to find the desired location.

**Filename** - This field will **not** be visible if you chose in setup to have ProDoc automatically "use the form title for filename". Use this field to enter a file name to store all files for the case. Specifying the filename here prevents manually typing it for each document assembly session.

Click the **Custom Fields** tab if you have set these up earlier and wish to enter appropriate information. A window similar to Figure 3-10 will appear.




In this example, Case Custom Fields were set up which included Judge, Court Clerk, and Opposing Counsel.

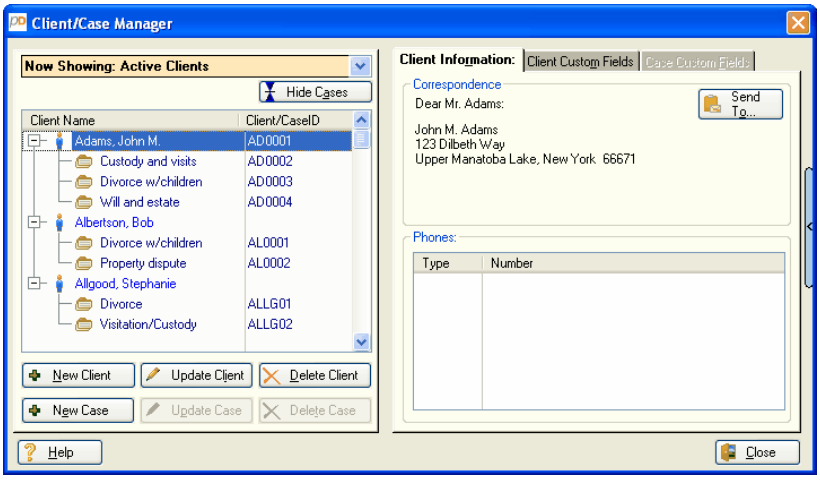
Type in the information as needed, then click the **OK** button to return to the **Select a Case** window.

Click the **Select Case** button on that window to use the new client and case for document assembly.

Figure 3-10, Enter Case Custom Fields Window

## Right side of Client/Case Manager Window

You can view detailed client correspondence, telephone, and custom field information on the right side of the Client/Case Manager window, depicted in Figure 3-11. While working on this window, if the right side is not already displayed, click the arrow button on the right border of the window.




The **Client Information** tab displays salutation, mailing address and phone information.

Click the **Send to...** button to reveal a pick list of actions involving this information. Choosing **Paste** functions opens your word processor and pastes the information. **Clipboard** functions copy information to the Windows clipboard for later pasting.

Figure 3-11, Client/Case Manager Window, Right Side

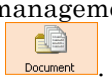
You can double-click any phone entries to edit the phone type and number. To edit any other information, click the **Update Client** or **Update Case** buttons on the left side.

Click the **Client Custom Fields** and **Case Custom Fields** tabs to display information already entered in the custom fields designated during setup or in a later options setting. If you want to change any

information, you must click the **Update Client** or **Update Case** buttons on the left side of the window.

Figure 3-12, Clients & Cases Drop-Down Box

**Document Manager** brings up a list of the documents, organized by client and case, which you've already assembled, and any additional files that you have selected for file management within ProDoc.

This selection performs the same function as the Document toolbar button, 

. You can also work with any documents in your computer and/or network that you can locate with Windows Explorer. Selecting this menu item or button brings up a window similar to Figure 3-13.

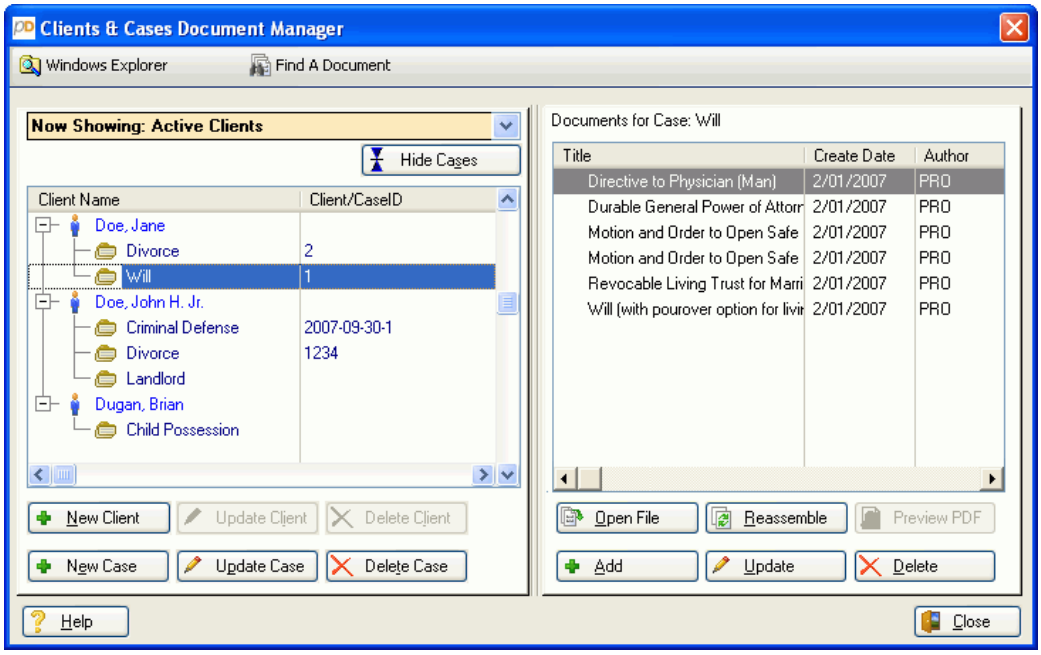



Figure 3-13, Clients & Cases Document Manager Window

This window is resizable to let you see more information. You can click and drag any vertical line separating columns to allow more or less room for each column. Where scroll bars are displayed, you can also scroll up or down through the lists or scroll the view from left to right.

## Left side - Clients and Cases

> **NOTE:** The display, navigation, client and case functions included in this window are the same as those covered in detail in the Client/Case Manager section of this chapter.

Click the links to jump back to the applicable portions of the Client/Case Manager section:

**Adding and Updating Clients** 33
**Adding and Updating Cases** 35

The upper left side of the Document Manager window lists the clients alphabetically by last name along with client and case IDs (if assigned).

The **Now Showing:** box tells you what types of contacts or clients are displayed. Click the drop down arrow to select the types to display:

**All Contacts**

**Active Clients (default)**

**Closed Contacts**

**Private Clients**

**Non-Clients**

Use the **Hide/Show Cases** toggle button to display or hide cases.

Clients, cases and unique IDs for each will be displayed alphabetically by last name. The IDs appear only if you have chosen to use these in setup preferences.

Click ⊞ or ⊟ to show or hide cases for individual clients.

To add a new client or update the information for the highlighted client, click **New Client** or **Update Client**. This brings up the **Client Dialog window** where you perform the desired action. You can also double-click a client to update the information for that client. Right-clicking on a client brings up a pop-up menu corresponding with the **New**, **Update** and **Delete** options displayed. You can also click **Delete Client** to remove the client from the system.

While a client is highlighted, the same functions apply to working with cases. Double-click a case or highlight it and click **Update Case** to reveal the **Case Dialog Window**, where you perform the desired action. Clicking **New Case** also reveals the window. Clicking **Delete Case** removes the case from the system.

**NOTE:** A locator field lets you type a letter which causes the highlighting cursor to jump to the first client name beginning with the letter.

## Right side – Documents

The right side of the window displays the documents linked to either the client or the case highlighted on the left side. This is illustrated by Figure 3-14:

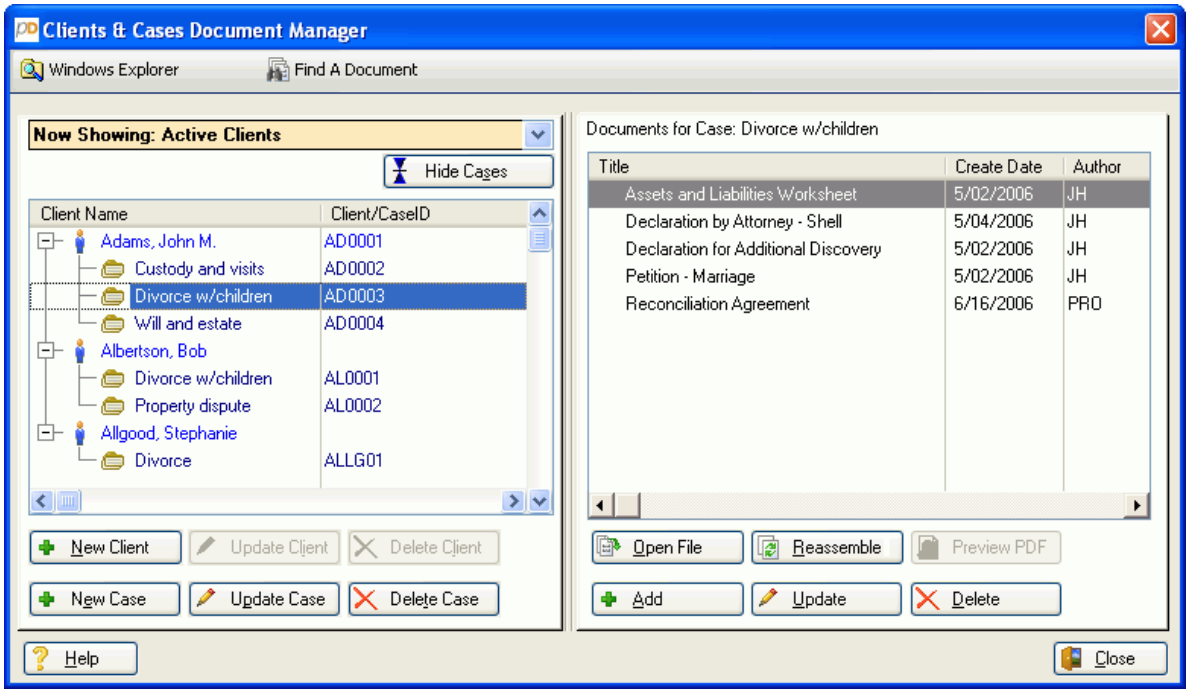



Figure 3-14, Documents Displayed in Document Manager Window

Documents are listed for the highlighted case, sorted alphabetically by title. If desired, you can click the column titles to sort in ascending or descending order by a particular column. Each document's **Create Date** and **Author** are displayed if the window is large enough. You can click and drag the vertical lines to allow more or less room for each column. You can also use vertical or horizontal scrollbars (displayed when needed) to scroll up and down or side to side.

As with clients and cases, you can double-click a document to update it. You can also click a document title to highlight it, then click the buttons to **Add** a document, **Update** the document or **Delete** just the document record or erase the actual document. You can click the **Open File** button to open the document in your word processor. If the highlighted document was assembled in ProDoc, the **Reassemble** button will be active and can be clicked to reassemble the document. You can right-click the document to reveal a pop up window with the same options.

If the document you select is a graphics document, you can view it by clicking the **Preview PDF** button.

## Top Section - Find Documents and Forms

One of the ProDoc software's key features is the ability to drag and drop files from computer search windows to your ProDoc database. Two buttons appear in the top section to help you locate documents and forms and either add them to your database or work with them in other ways.

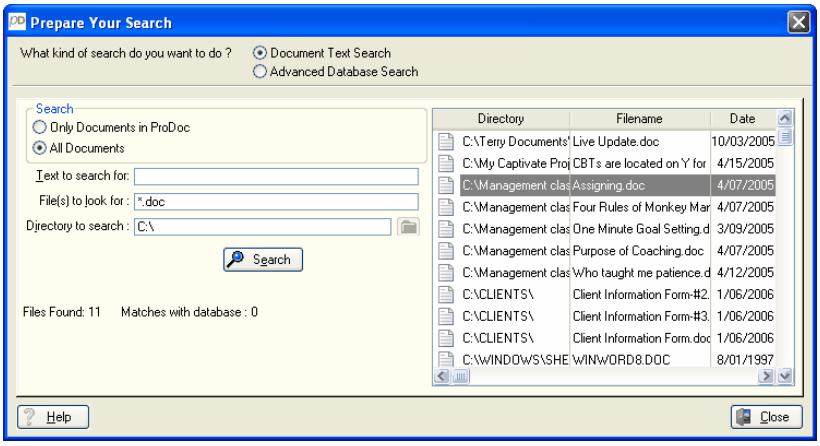
The Windows Explorer functions described below are dependent upon the selections made in **Options and Settings** for **Miscellaneous Firm Settings** 74. Drag and drop results can be set to do the following: physically move selected files to the client/case file folder; only copy files to the client/case folder; or have ProDoc ask you what to do each time you drag and drop.

- **Windows Explorer** - Click this button to open Windows Explorer. You can locate documents and drag them to the right side of the Document Manager window to include them in your ProDoc database. You should resize the explorer window to facilitate selecting one or more file(s) for "dragging" from Explorer over to the right side of the Document Manager window and "dropping" them there. They will then be added to the database for the client or case currently selected.

  **NOTE:** You can do the same thing using **Windows File Find** or **Search**, and drag the result of your search to the Documents Organizer browse window.

- **Find a Document** - Click this button to search for documents throughout your computer or network folders.

When you click the **Find a Document** button, a window opens similar to Figure 3-15. The Clients & Cases Document Manager stays open also.


Prepare Your Search
What kind of search do you want to do ?
Document Text Search
Advanced Database Search
Search
Only Documents in ProDoc
All Documents
Text to search for:
File(s) to look for : *.doc
Directory to search : C:\
Search
Files Found: 11
Matches with database : 0
Directory
Filename
Date
C:\Terry Documents\ Live Update.doc 10/03/2005
C:\My Captivate Proj CBTs are located on Y for 4/15/2005
C:\Management clas Assigning.doc 4/07/2005
C:\Management clas Four Rules of Monkey Mar 4/07/2005
C:\Management clas One Minute Goal Setting.d 3/09/2005
C:\Management clas Purpose of Coaching.doc 4/07/2005
C:\Management clas Who taught me patience.d 4/12/2005
C:\CLIENTS\ Client Information Form-#2. 1/06/2006
C:\CLIENTS\ Client Information Form-#3. 1/06/2006
C:\CLIENTS\ Client Information Form.doc 1/06/2006
C:\WINDOWS\SHE WINWORD8.DOC 8/01/1997
Help
Close

To facilitate drag and drop, you should resize the window as small as possible and move it as far away as possible from the Document Manager window.

As an example, this search was set up to find any file with a .doc extension. The file Assigning.doc was found.

Figure 3-15, Prepare Your Search Window

You can search any folder, including ProDoc databases, by selecting Document Text Search. Then select your search scope by clicking the button labeled either All Documents or Only Documents in ProDoc.

You can enter matching text in the field labeled **Text to search for:**. Your entry can be up to 512 characters long. ProDoc will search any text document it finds for matching text.

Opposite the field labeled **File(s) to look for**, you can enter classic DOS masks, like ***.doc** to look only for Word documents; **P*** to find any files starting with the letter P, and so on.

Enter your Directory to search by either typing it in or clicking the browse button, , and selecting the directory. Subdirectories will automatically be searched.

Documents matching your criteria will be displayed in the right side of the window. Documents you find outside of ProDoc databases can be dragged and dropped to the Document Manager window to include them in your ProDoc database. Click a file, hold the left mouse button down, and drag the document to the left side of the Document Manager window (to a client or case) or to the right side, then release the button.

Documents and files you add to clients and cases can be opened, edited and saved with their associated program. For example, Word documents will open in Word if you highlight the document and click the **Open** button.

You can correct any drag and drop mistakes by repeating the same operation inside the Document Manager window.

You can also click the button labeled **Advanced Database Search** to search only the ProDoc database with a variety of matching options and criteria. Click the **Help** button when you use this screen to see all available options and controls.

**Case Answers** - This menu choice brings up a list of all the questions you have answered in a case, which you can quickly edit so that your case documents reflect correct information. This changes only the answers in the ProDoc data files, not in the documents already assembled. To insert the new answers into your documents, you must reassemble the documents.

**NOTE:** Changing C**ase Answers** is handled differently for those answers that are taken from the **Firm Information** fields (which were entered upon installation). See **Firm Information in Answers** 74 for more information.

## PowerPacks Menu

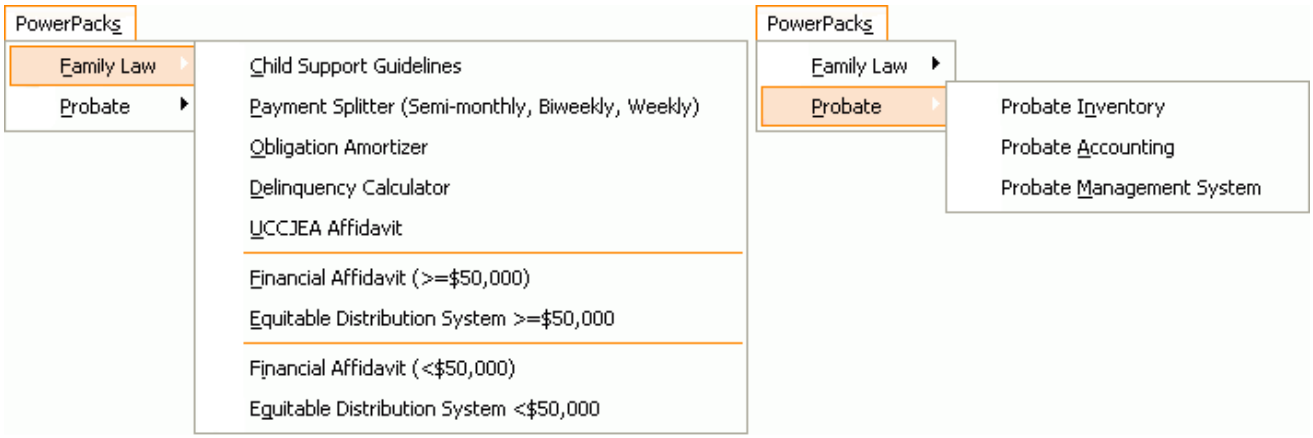



Figure 3-16, Florida PowerPacks Menu

**PowerPacks -** In Figure 3-16, the PowerPack name is listed on the left and the programs in the PowerPack are listed on the right side of the menu. This menu will change depending upon which PowerPacks you have installed.

We have developed PowerPacks—Additional Time savers, specific to each state we serve, which are designed to significantly increase your productivity. These programs allow you to enter information in your clients' case files and manage the information quickly and efficiently. If calculations are necessary, the programs perform the calculations and insert the results wherever they are needed.

For more information on the programs available for your state, please visit our Web site at **www.prodoc.com** or call our Sales Department at (800) 759-5418.

## Print Menu

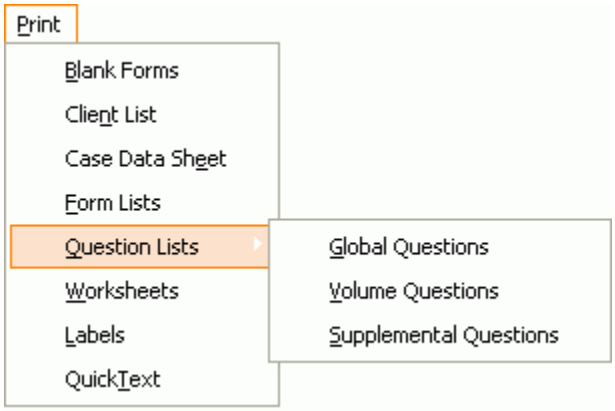



Figure 3-17, Print Drop-Down Menu

This menu item conveniently lists in one place ALL of the print options that are available in ProDoc, including the list of items which follows.

**Blank Forms** 42 allows you to quickly preview and print any form available in ProDoc so that you can quickly determine if it contains the language you need. Blank forms printed in this manner contain

visible coding and formatting that will not appear in your finished ProDoc documents and, accordingly, generally should not be opened for editing directly in your word processor.

**Client List** 43 prints a list of clients from your database.

- You can select any combination of **Open** or **Closed Clients** and/or **Non-Clients**. Within these categories, you can sort the list by Last Name, Client ID, City, State and Zip Code.
- You can also choose to print open and/or closed cases along with your client listings.

**Case Data Sheet** 44 prints a summary report for a particular case. You can select the case from active or inactive cases.

**Form Lists** 44 prints a listing of all master forms in a particular volume:

- **Alphabetical Order** prints a listing of forms in the volume you select in alphabetical order.
- **Menu Order** prints a listing of forms in the volume you select in numerical order by the document selection number.
- **Supplemental** prints a listing of any supplemental forms that you have created and added to a volume.

**Question Lists** gives you three menu options:

- **Global Questions** 45 prints a list of global questions that apply to all volumes.
- **Volume Questions** 45 prints a list of questions that apply to selected volumes.
- **Supplemental Questions** 45 prints a list of questions specific to any supplemental forms you've added.

**Worksheets** 46 generates interview questionnaires for clients, reducing the time it takes you to produce documents. There are five different types of worksheets to choose from:

- **Assembly Questions** are those asked during the first phase (assembly or cut-and-paste) of an assembly session.
- **Merge Questions** are asked during the merge phase. Prints all questions that may be asked during the merge phase for the selected document.
- **Custom Merge Questions** creates a "custom" worksheet that contains only those merge questions that would be asked for a specific set of answers to the assembly questions.
- **All Questions** prints a list of all questions asked for the selected form(s).
- **All Questions as Asked** prints a list of all questions for the form(s) in the order asked.

**Labels** 47 displays the setup window for printing labels for all or selected clients. You may choose from a number of commonly available templates. You can also control which labels on a page are printed by selecting how many labels to skip.

**QuickText** 47 gives you a convenient way to view and/or print a summary report of all established QuickText entries along with their assigned hot keys.

## Print Blank Forms Menu

The **Print Blank Forms** menu choice lets you to print a document that has blank spaces in the place of fill-in-the-blank answers. You can see what the completed document will look like before you print it. Many attorneys use this feature so they can fill in the information on paper instead of directly entering the information into a computer while the client is in the office.

This topic covers the basic choices for this function from beginning to end. Detailed help for each window you see is available by pressing the **F1** key or clicking the **Help** button on each window.

1. From the **Main Menu,** click **Print → Blank Forms**.
2. Click **Select Form**.
3. Select a volume with the drop down arrow at the top of the window. A list of forms appears.
4. Select a subvolume if desired. Set the list order with the **Numerical** or **Alphabetical** tabs.
5. Double-click the form you want. If it's not visible, you can scroll down or use the **Find** button to search for a form by entering search words. Clicking the **Info** button opens a window with specific form information.
   a. If you select a graphic form, the form will always be printed blank and no questions will be asked. The remaining steps here will not apply. Simply click the **Print** button to send the form to your printer.
   b. If you select a non-graphic form, see steps 6-10 below.
6. Select **Assembled** or **Not Assembled**.
7. For **Assembled**, you'll be given assembly questions to answer. Fill-in-the-blank underlines "___" will be inserted in the document. For **Not Assembled**, no questions will be asked and the form will appear with programming codes and selection choices.
8. Click **Print**. If you chose **Assembled**, a series of questions will appear.
9. You can type in answers or insert **QuickText** entries, and you can also designate the answer as a **Default Answer** for the question. Click **Next** or **Previous** to move between questions. An explanation of the question can be toggled on and off by the **Show/Hide Explanation** tab. After you answer the questions, the form will be displayed in a window.
10. You can send the form to your printer, open it in your word processor to view how it will look when printed, or close it by clicking the displayed buttons.

## Print Client Lists Menu

The **Print Client list** menu choice prints a list of all clients in the database. This topic covers the basic choices for this function from beginning to end. Detailed help for each window you see is available by pressing the **F1** key or clicking the **Help** button on each window.

- You can select any combination of **Open** or **Closed Clients** and/or **Non-Clients**. Within these categories, you can sort the list by Last Name, Client ID, City, State and Zip Code.
- You can also choose to print open and/or closed cases along with your client listings.

To print a client list:

1. From the **Main Menu**, click **Print → Client List**.
2. Use the drop down arrow next to **Sort Clients by:** to choose a sort order for your list.
3. Click the boxes to select any combination of **Open, Closed** or **Non-Clients**.
4. Along with these entries, you can print cases. Select the appropriate check boxes to do this.
5. Select **Print Preview** if you want to see the results on the screen before printing.
6. Click **Print**. A window for your default printer will appear.
7. Click **OK**, or change printers and click **OK**.

If you didn't choose **Print Preview**, your report will print. If you chose **Print Preview**, you will see the report on your screen before printing it. For detailed help with the **Print Preview Screen**, click **here** 48.

## Print Case Data Sheet Menu

The **Print Case Data Sheet** menu choice prints a summary report for a particular case. This topic covers the basic choices for this function from beginning to end. Detailed help for each window you see is available by pressing the **F1** key or clicking the **Help** button on each window.

1. From the **Main Menu**, click **Print → Case Data Sheet**. Click the **Select Case** button on the **Case Data Sheet Report** window.
2. If the case you want isn't shown, use the **"Now Showing"** drop down arrow to choose a type of contact/client: **All Contacts, Active Clients, Closed Contacts, Private Clients or Non-Clients.** You can also click the **Show/Hide Cases** button to perform each operation. Finally, you can use the scroll bar.
3. Select a case. Note that you can also add, update or delete cases. You can also reveal more detailed client information by clicking on the arrow button on the right border.
4. Select **Print Preview** if you want to see the results on the screen before printing.
5. Click **Print**. A window for your default printer will appear.
6. Click **OK**, or change printers and click **OK**.

If you didn't choose **Print Preview**, your report will print. If you chose **Print Preview**, you will see the report on your screen before printing it. For detailed help with the **Print Preview Screen**, click **here** 48.

## Print Form Lists Menu

The **Print Form lists** menu choice prints all master forms in a particular volume. This topic covers the basic choices for this function from beginning to end. Detailed help for each window you see is available by pressing the **F1** key or clicking the **Help** button on each window.

- **Alphabetical Order** prints a listing of forms in the volume you select in alphabetical order.
- **Menu Order** prints a listing of forms in the volume you select in numerical order by the document selection number.
- **Supplemental** prints a listing of any supplemental forms that you have created and added to a volume.

To print a form list:

1. From the **Main Menu**, click **Print → Form Lists**.
2. Use the drop down arrow to choose a sort order for your list: **Alphabetical Order, Menu Order** (in the order forms appear on a volume list), or **Supplemental** (will print only supplemental forms you've added to a volume).
3. Click **Select Volume**. Choose a volume from the list. Click **OK**.
4. Select **Print Preview** if you want to see the results on the screen before printing.
5. Click **Print**. A window for your default printer will appear.
6. Click **OK**, or change printers and click **OK**.

If you didn't choose **Print Preview**, your report will print. If you chose **Print Preview**, you will see the report on your screen before printing it. For detailed help with the **Print Preview Screen**, click **here** 48.

## Print Global Questions Menu

This menu choice allows you to print a list of questions that apply to all volumes. You can print either **Merge Questions** or **Assemble Questions**.

- **Merge Questions** ask for information such as names, addresses and dates for a specific case document.
- **Assemble Questions** are used by ProDoc to determine how to cut and paste clauses/paragraphs in a master form to create a customized document for your specific case.

Use the following steps to print **Global Questions**:

1. From the **Main Menu**, click **Print → Question Lists → Global Questions**.
2. Choose either **Merge** or **Assemble Questions** by clicking the button next to your choice.
3. The **Print Preview** box is selected by default. If you do not want to preview the print job before printing, click the box to deselect the option.
4. Click **Print**. The Report Destination window appears.
5. Click **OK**, or change printers and click **OK**.

If you didn't choose **Print Preview**, your report will print. If you chose **Print Preview**, you will see the report on your screen before printing it. For detailed help with the **Print Preview Screen**, click **here** 48.

## Print Volume Questions Menu

This menu choice allows you to print a list of questions that apply to a single volume. You can print either **Merge Questions** or **Assemble Questions**.

- **Merge Questions** ask for information such as names, addresses and dates.
- **Assemble Questions** help ProDoc determine how to cut and paste clauses/paragraphs in a master form to create a customized document for your specific case.

Use the following steps to print **Volume Questions**:

1. From the **Main Menu**, click **Print → Question Lists → Volume Questions**.
2. Choose a Volume by clicking the **Select Volume** button and selecting the appropriate volume from the **Volume Selection Window**.
3. Choose either **Merge** or **Assemble Questions** by clicking the button next to your choice.
4. The **Print Preview** box is selected by default. If you do not want to preview the print job before printing, click the box to deselect the option.
5. Click **Print**. The Report Destination window appears.
6. Click **OK**, or change printers and click **OK**.

If you didn't choose **Print Preview**, your report will print. If you chose **Print Preview**, you will see the report on your screen before printing it. For detailed help with the **Print Preview Screen**, click **here** 48.

## Print Supplemental Questions Menu

This menu choice allows you to print a list of supplemental questions that you've added to your ProDoc installation to tailor it to your needs. Use the following steps to print **Supplemental Questions**:

1. From the **Main Menu**, click **Print → Question Lists → Supplemental Questions**.
2. Choose a Volume by clicking the **Select Volume** button and selecting the appropriate volume

from the **Volume Selection Window**.

3. The **Print Preview** box is selected by default. If you do not want to preview the print job before printing, click the box to deselect the option.
4. Click **Print**. The Report Destination window appears.
5. Click **OK**, or change printers and click **OK**.

If you didn't choose **Print Preview**, your report will print. If you chose **Print Preview**, you will see the report on your screen before printing it. For detailed help with the **Print Preview Screen**, click **here** 48.

## Print Worksheets Menu

The **Print Worksheets** menu choice generates interview questionnaires for clients, reducing the time it takes you to produce documents. This topic covers the basic choices for this function from beginning to end. Detailed help for each window you see is available by pressing the **F1** key or clicking the **Help** button on each window.

There are five different types of worksheets to choose from:

- **Assembly Questions** are those asked during the first phase (assembly or cut-and-paste) of an assembly session.
- **Merge Questions** are asked during the merge phase of document assembly. This prints all questions that may be asked during the merge phase.
- **Custom Merge Questions** creates a "custom" worksheet that contains only those merge questions that would be asked for a specific set of answers to the assembly questions. For instance, using this option for a divorce petition would cause ProDoc to ask how many children there are. If you answer zero, then the worksheet will not include questions that pertain only to couples with children. This option lets you use the answers you previously entered for a case as default answers to the assembly questions and to include the assembly questions and answers in the worksheet.
- **All Questions** prints a list of all questions asked for the selected form(s).
- **All Questions as Asked** prints a list of all questions for the form(s) in the order asked

Perform the following steps to print worksheets:

1. From the **Main Menu**, click **Print** → **Worksheets**.
2. Choose a report type by clicking the button next to the desired type.
3. Click the **Select Forms** button. Basic functions of the window that appears are described below.
    a. You can find and select one or multiple forms from the volume you select.
        i. You can choose from the sub-volumes on the left; the default is **All**.
        ii. You can also display the list in **Numerical** or **Alphabetical** order by selecting the tabs.
        iii. Once you've added **Supplemental forms** to a volume you select, you can find these by selecting the **Supplemental** tab.
        iv. Use the **Form Sets** tab to add the forms from any special sets you have created to the list of forms to print. If you have not yet set up any special sets, you can do so by clicking the **Set up form sets** button.
        v. Click the **Selections** tab to display only the forms you have selected.
    b. Click the box next to the forms you want. You can research the forms further:
        i. Click the form title to select the form;

ii. Click **Form Info** to see discussion about the highlighted form and/or **View** to see the form.

c. You can click **Find** to search for a form by a word or phrase in either the form and title or only in the title. You can flip through instances using the **Find Previous** or **Find Next** buttons.

4. Select the form(s) for which you want a worksheet. If you chose **Custom Merge Questions,** you may click the **Select Case** button to select a specific case before proceeding. This is not required. However, if you select a case, you can save the answers you provide in the case file.
5. If desired, click the box labeled **Show Question Token Numbers**. These numbers are assigned by ProDoc to identify the questions and control certain other variables. If the box is selected, these questions will be displayed in your report.
6. If you chose **Custom Merge Questions**, the **Show Assembly Questions** selection box is displayed. You may click this box to print the questions that will be asked during assembly of the form.
7. Click **Print**. If you are producing a report of **Custom Merge Questions**, you will be prompted to answer questions before printing. When you are finished, the Report Destination window appears.
8. Click **OK**, or change printers and click **OK**.

If you didn't choose **Print Preview**, your report will print. If you chose **Print Preview**, you will see the report on your screen before printing it. For detailed help with the **Print Preview Screen**, click **here** 48.

## Print Labels Menu

The **Print Labels** menu choice displays the setup window for printing mailing labels for all contacts or for only those contacts you select. This section covers the basic choices for this function from beginning to end. Detailed help for each window you see is available by pressing the **F1** key or clicking the **Help** button on each window.

1. Choose a template by clicking on the drop-down arrow field next to **Label:**. Several common label definitions are included here, and you can also design your own. See the **Tools Menu** 74 to do this.
2. If desired, select the **Skip Labels** box to skip a set number of labels. Select the number by clicking the spin arrows in the **How many to skip:** field.
3. By default, the **All Contacts** button is selected. If you want to select specific clients, click the **All Contacts** button to cancel the selection.
4. Select specific contacts by clicking the **Select Contacts** button.
5. Click the **Select Contacts** button. Choose contacts from the resulting window.
6. The **Print Preview** box is selected by default. If you do not want to preview the print job before printing, click the box to cancel the selection.
7. Ensure you have loaded the appropriate label forms in your printer. Click the **Print** button.

If you chose print preview, you will see the report on your screen before printing it. For detailed help with the **Print Preview Screen**, click **here** 48.

## Print QuickText Menu

The **Print QuickText** menu choice lets you print a list of QuickText entries you've created.

1. From the **Main Menu**, click **Print** → **QuickText**.

2. Select or unselect **Print Preview** by clicking in the box. Either way, the print window for your default printer appears. Click **OK** to print or to preview the list before printing, depending on your **Print Preview** choice.
3. Click **OK**, or change printers and click **OK**.

If you didn't choose **Print Preview**, your report will print. If you chose **Print Preview**, you will see the report on your screen before printing it. For detailed help with the **Print Preview Screen**, click **here** 48.

## Print Preview Window Menu

If you selected Print Preview while printing a report, a window similar to Figure 3-18 appears. See the captions on the window for descriptions of icon/arrow functions. You can search, flip through pages, select pages to print and more.

When you're finished previewing, click the icon to print only the current page, or click the icon to print all pages or the page range you've designated.

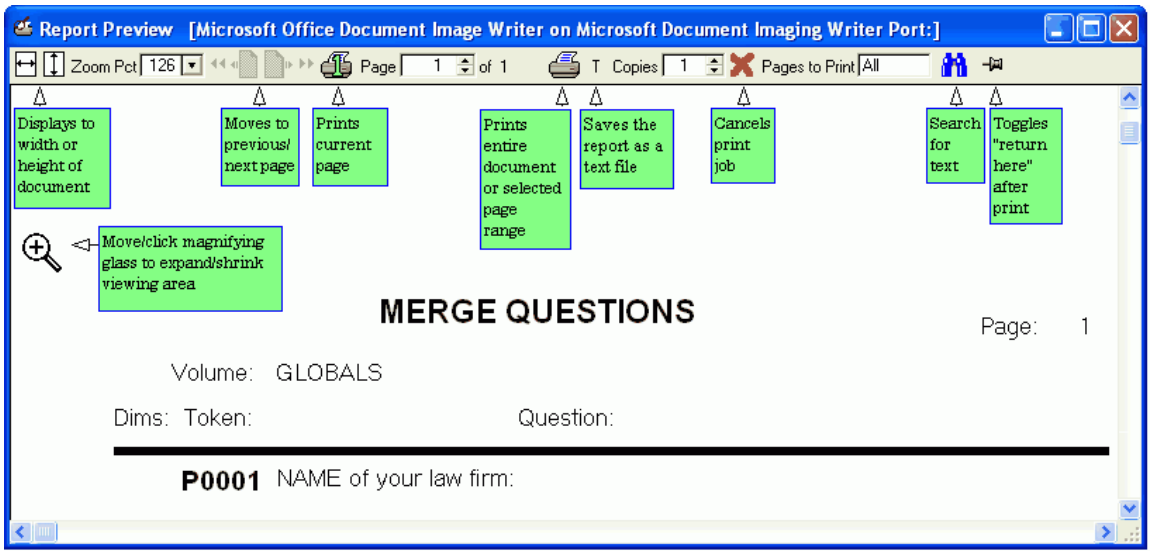

Report Preview [Microsoft Office Document Image Writer on Microsoft Document Imaging Writer Port:]
Zoom Pct 126
Page 1 of 1
Copies 1
Pages to Print All
Displays to width or height of document
Moves to previous/ next page
Prints current page
Prints entire document or selected page range
Saves the report as a text file
Cancels print job
Search for text
Toggles "return here" after print
Move/click magnifying glass to expand/shrink viewing area
MERGE QUESTIONS
Page: 1
Volume: GLOBALS
Dims: Token:
Question:
P0001 NAME of your law firm:

Figure 3-18, Print Preview Screen Functions

# Customize Menu

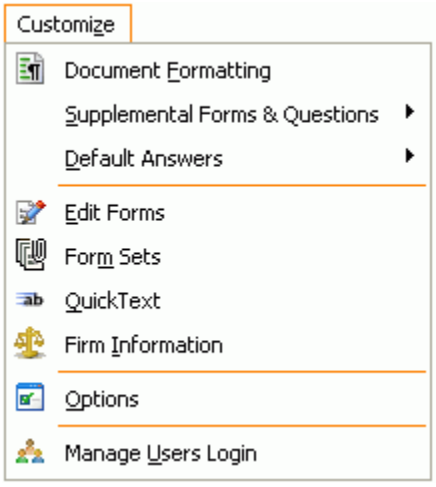



Figure 3-19, Customize Menu

This menu item brings up a list of settings and information used throughout ProDoc.

**NOTE:** You must have Supervisor login privilege to access the **Manage Users Login.**

**Document Formatting** 50 lets you set default formatting options for word processing documents and forms.

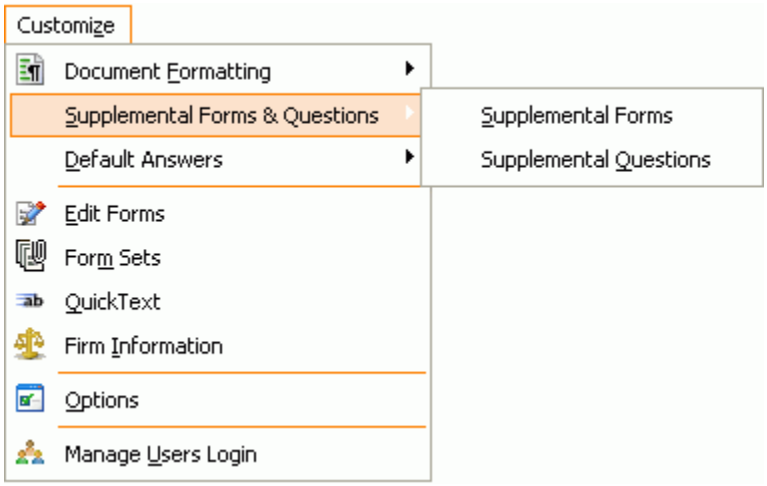



Figure 3-20, Supplemental Forms & Questions Menu

**Supplemental Forms and Questions** 54 leads you to two sections:

- **Supplemental Forms** allows you to access any forms that you've created and added to ProDoc software's thousands of professionally developed master forms. See **Appendix D** 221 of the software manual for help on creating your own forms.
- **Supplemental Questions** lists supplemental questions you've added to your ProDoc installation to tailor it to your needs. You can also add, change or delete supplemental questions here.

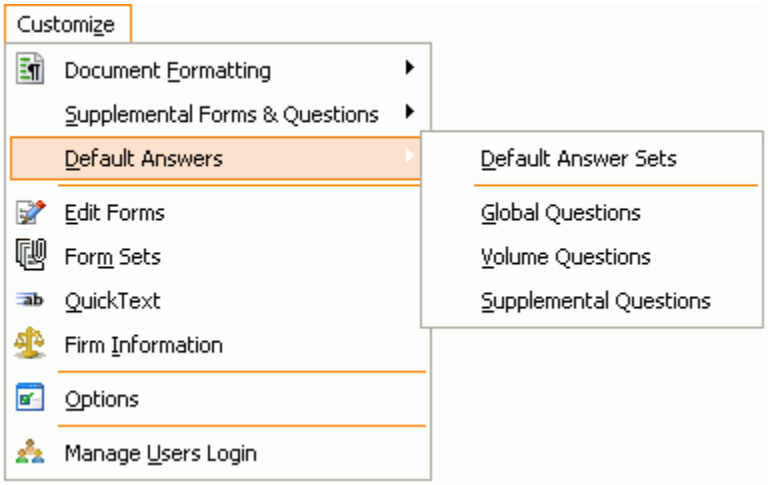



Figure 3-21, Default Answers Menu

**Default Answers** 56 allows you to specify what information is automatically entered when questions are asked by the program. This feature is categorized by global questions, questions for each volume, and supplemental questions. You can also use this menu item to import another user's default answers. This is useful in many situations that arise when different users must work on the same computer.

**Edit Forms** 59 allows you to edit the master forms (or form templates) used in ProDoc. Use this option to open a forms management window where you can search for forms or select a volume to find the form (s) that you wish to edit. For detailed information on editing forms, see **Appendix B** 198 and **Appendix D** 221.

**Form Sets** 59 allows you to designate groups of forms and retrieve them by the set name. For instance, if you've identified three forms that you complete for every adoption case, you can group those forms here and label them appropriately.

**QuickText** 60 lets you save text (e.g., courthouse addresses, favorite clauses) that you may wish to easily recall and re-use in any case, and assign hot keys to these text entries. This helps you avoid retyping repetitive phrases.

**(If available)**

**Firm Information** 61 lets you enter or edit relevant firm information **(except your Firm Name, which is entered during registration)** so you can avoid entering it on each document, form or report.

**Options** 62 brings up the **Options and Settings** window. You can specify settings and set defaults here for forms, document assembly options, client and case IDs and custom fields, choice of word processor, file name styles and locations, graphic form settings, startup options and backup settings. You can also specify how ProDoc interacts with your word processor and with the Small Office Suite and Timeslips (if these are installed).

**Manage Users Login** 13 is only available to designated Supervisors. This choice is not displayed in the graphic figures in this manual. This choice opens the **Browse Users Records** window, which Supervisors can use to manage various user settings.

## Document Formatting Menu

This menu allows you to change the formatting properties of **word processing** documents. These settings do **not** apply to **graphic forms** 66.

While ProDoc has an excellent default format for documents, you can set specific formatting properties if desired. You can change formatting for all documents (Global Settings), all documents in a Volume, or individual documents. This feature gives you complete control over how your finished documents appear when printed. When you select **Document Formatting** from the menu, the **Default Formatting** window appears. A description of the window and its functions follows.

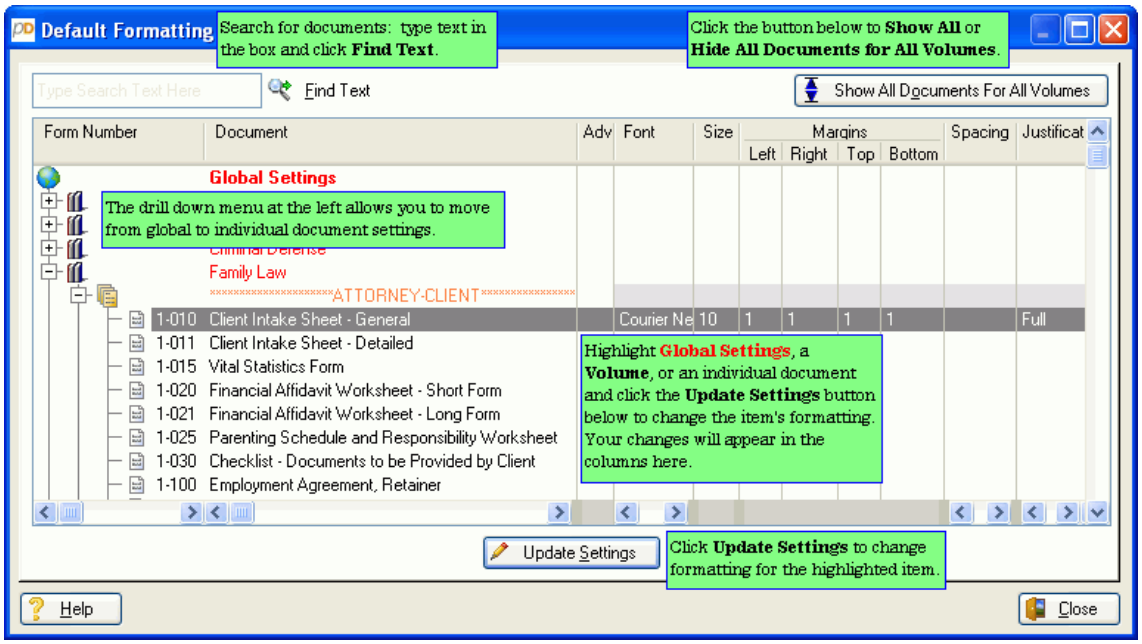

Default Formatting
Search for documents: type text in the box and click Find Text.
Click the button below to Show All or Hide All Documents for All Volumes.
Type Search Text Here
Find Text
Show All Documents For All Volumes
Form Number
Document
Adv
Font
Size
Margins
Left
Right
Top
Bottom
Spacing
Justificat
Global Settings
The drill down menu at the left allows you to move from global to individual document settings.
Family Law
**********ATTORNEY-CLIENT**********
1-010 Client Intake Sheet - General
Courier Ne 10 1 1 1 1 Full
1-011 Client Intake Sheet - Detailed
1-015 Vital Statistics Form
1-020 Financial Affidavit Worksheet - Short Form
1-021 Financial Affidavit Worksheet - Long Form
1-025 Parenting Schedule and Responsibility Worksheet
1-030 Checklist - Documents to be Provided by Client
1-100 Employment Agreement, Retainer
Highlight Global Settings, a Volume, or an individual document and click the Update Settings button below to change the item's formatting. Your changes will appear in the columns here.
Update Settings
Click Update Settings to change formatting for the highlighted item.
Help
Close

Figure 3-22, Default Formatting Window

When you choose **General Formatting,** the **Default Formatting** window appears. The window opens with **Global Settings** highlighted. In the navigation tree, this is designated with the Globe icon. To change formatting for all documents in all volumes, click the **Update Settings** button at the lower right corner of the window. If you navigate elsewhere on this window and then decide to change global settings, click anywhere on the **Global Settings** line to highlight it, then click **Update Settings.**

To change settings for all documents in a **Volume** (designated with the icon) or for an individual document (designated with the icon), you can click the desired volume or document, then click the **Update Settings** button. You will not be able to update settings by chapters ( icon); these only group related forms. There are several methods for finding the volume or document that you want:

- Type a word or phrase into the box at the bottom left corner of the window and click the **Find Text** button. The search process will find instances of the text in volume and document titles and open the navigation tree to reveal a match. Click the **Find Text** button again to reveal the next match if needed. Click **Update Settings** when the item you want is highlighted.
- Use the **Show/Hide all Documents** button to either display or hide all documents. Selecting "Show" will take some time; it fully expands the navigation tree on the left side of the window. Hiding all documents makes it easier to scroll to volumes. Use the scroll bar at the right of the window to scroll to the item you want, click it, and then click **Update Settings**.
- Use the left side tree to drill down to a volume or document. Click ⊞ to expand a category and ⊟ to shrink the category header. Click the item you want, then click **Update Settings**.

After you click **Update Settings**, the Document Formatting Options window appears, similar to Figure 3-23. This window has two tabs - **Standard** and **Advanced.**

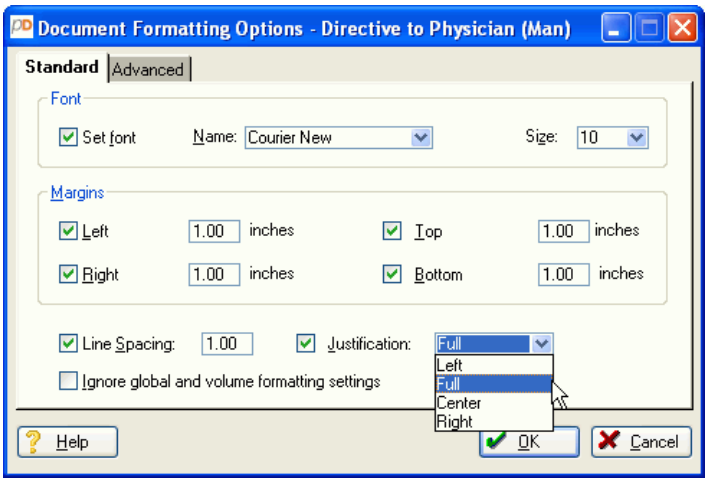



Figure 3-23, Document Formatting Options, Standard

The **Standard** tab is selected by default. It allows you to set default standard formatting options: font type and size, margins, line spacing and text justification. Click in each box and/or use drop down arrows to change settings. The formatting options work almost exactly the same as those in popular word processing programs, with an important exception: the **Ignore global and volume formatting settings.** If you check this box, the document will be produced with the exact settings shown in the window and global/volume configuration files will be ignored. If you don't check it and leave some features unchanged, global and volume settings will be used for the unchanged features.

### Document Formatting Window Terms Explained

**Font** – The particular style of type used in your document.

**Name** - Name of the font for use. This includes the most popular proportional serif (Times New Roman and Roman) and sans serif (Arial) fonts. The default font is Times New Roman, unless an agency form requires a different font.

**Font Size** - Size of the font in points. One point is 1/72nd of an inch, so 12 point type would be 1/6th inch high. Standard sizes for most correspondence is 10 point or 12 point type.

**Margins** - Margin size in fractions of an inch. Margins of one-half inch would be entered as 0.50 while margins of one inch would be entered as 1.00. You can specify settings for **Left**, **Right**, **Top**, and **Bottom** margins.

**Line Spacing** - Spacing between lines. Normal type is single-spaced, and you can enter whole numbers and fractions. For single spacing enter 1.00, and for double spacing enter 2.00.

**Justification** - **Left-justified** text has a smooth left edge and ragged right edge, while **full-justified** text has smooth right and left edges with variable spacing between words. **Right-justified** text results in a smooth right edge with variable spacing between words. **Center** is rarely used in documents since both sides are uneven. You can specify settings for **Left**, **Full**, **Center**, and **Right** justification. Using full justification with mono-spaced type (Courier New) may result in excessive spacing between letters. If you use full justification, you should also use a proportional font, such as Times New Roman.

**Ignore Formatting Settings** - The Volume Formatting Options window contains an **Ignore global formatting settings** check box. If it is checked, the value set in the form is used for any formatting item that is unchecked in the Volume Formatting Options window instead of the value set in the Global Formatting Options window. The Specific Documents Formatting Options window also contains an **Ignore global and volume formatting settings** check box. If it is checked, the value in the form is used for any formatting item that is unchecked in the Specific Document Formatting

Options window instead of the value set in either the Global or Volume Formatting Options windows.

**How does ProDoc Prioritize Formatting?**

Global, Volume and Specific Document formatting values can all apply to a particular document. Here's how ProDoc determines which to use:

1. If there is a Specific Document value for the particular setting, ProDoc uses it.
2. Otherwise, if there's a Volume value for the setting and "Ignore global and volume formatting settings" was not checked in the Specific Document Formatting Options window for the document, ProDoc uses the Volume value.
3. Otherwise, if there is a Global value for the item and "Ignore global and volume formatting settings" was not checked in the Specific Document window for the document, and "Ignore global settings" was not checked in the Volume Formatting Options window for the volume containing the document, ProDoc uses the Global value.
4. Otherwise, ProDoc uses the value in the ProDoc form.

**NOTE:** The sources for formatting item values are determined item by item. A document might be assembled using a Specific Document line spacing value, a Volume left margin value, a Global justification value and the font in the ProDoc form. **Formatting option settings apply only to the user who created them.** To make the formatting option settings of one user available to another user, you must copy the files that contain the settings. Global formatting option values are stored in a file called XXXGCFG.INI in the ProDoc home directory where "XXX" is the initials of the user who created the settings. The volume and specific document settings are stored in files called XXXCFG.INI in the volume subdirectories. To make the settings available to user YYY, copy XXXGCFG.INI to YYYGCFG.INI and each of the XXXCFG.INI files to YYYCFG.INI. This will overwrite any formatting option settings that user YYY might have had.

Click the **Advanced** tab to create a configuration file for such things as headers and footers, page numbers, fonts, and the like.

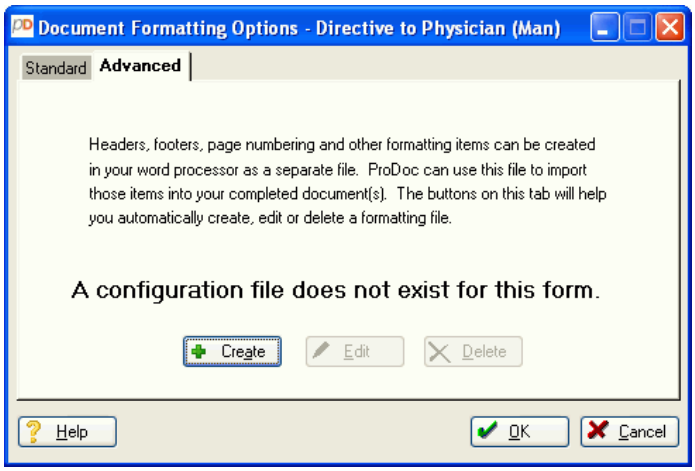

Document Formatting Options - Directive to Physician (Man)
Standard
Advanced
Headers, footers, page numbering and other formatting items can be created in your word processor as a separate file. ProDoc can use this file to import those items into your completed document(s). The buttons on this tab will help you automatically create, edit or delete a formatting file.
A configuration file does not exist for this form.
Create
Edit
Delete
Help
OK
Cancel

Figure 3-24, Document Formatting Options, Advanced

You can click **Create** to open your word processing program and create an advanced configuration file. If you've already created an advanced configuration file, **Edit** enables you to open your word processor and make changes to it. **Delete** lets you delete it.

You can refer to your particular word processor's documentation to determine how to create a file containing headers, footers, etc. When a document is assembled, ProDoc checks for the presence or absence of configuration files, and if one or more configuration files that apply to the document exist,

ProDoc inserts the highest priority configuration file into the document. *Note: If the configuration file sets the value of one of the Formatting Options items, e.g. left margin, the value set in the formatting window takes precedence and will override the value in the configuration file.*

**Configuration Files**

There are three types of configuration files:

- The global configuration file applies to all documents and has the lowest priority. It is stored as GLOBAL.CIF in the ProDoc home directory.
- A volume configuration file applies to all documents in one volume. Each is stored as VOLUME.CIF in the subdirectory of the volume to which applies.
- A specific document configuration file applies to a single document. Each is stored as DOCNAME.CIF, where "DOCNAME" is the filename of the form from which the document is generated, in the subdirectory of the volume containing the form.

To create a global configuration file, click the **Create** button. If your word processor is not running, a dialog box will ask you whether you want to start it. Click **Yes** to start your word processor. Once your word processor is running, add the formatting features you want. The procedure will differ depending on which word processor you use.

Headers, footers and normal text items can be added. You can also insert such things as symbols, the date and/or time, and page numbers. Follow your word processor's guidance on creating or inserting items other than normal text. You may also insert ProDoc codes as text, such as ~P0001G, which during document assembly causes ProDoc to ask the user to enter the name of the law firm and then replace all occurrences of ~P0001G with that answer.

Many customers choose to have the name of the document and the case style show up in their headers or footers. To do this, insert the code ~I9100G into headers and footers. The code for the Petitioner's name is ~M1200G and the Respondent is ~M1300G. To set up the header or footer to show the case style, you should enter **~M1200G v. ~M1300G.**

After you have entered your desired contents, select **File/Save.** The **Save File** window will appear. The correct filename is GLOBAL.CIF for a global configuration file, VOLUME.CIF for a volume configuration file, and DOCNAME.CIF where "DOCNAME" is the name of the form to which the configuration file applies.

Save Global Configuration files to the ProDoc home directory. Save a Volume or Specific Document configuration file in the volume's subdirectory. You should save the file as a WordPerfect 5.X file and ***surround the file name with quotation marks*** *(e.g. "GLOBAL.CIF")* in order to avoid having your word processor append its unique file extension. Some Word users may only be able to save the document as a Word Document. After saving the file, exit your word processor and return to ProDoc. Subsequently assembled documents to which the configuration file applies will contain your additions or changes.

## Supplemental Forms and Questions Menu

**Supplemental Forms** allows you to access any forms that you've created and added to ProDoc software's thousands of professionally developed master forms. See **Appendix D** 221 of the software manual for help on creating your own forms.

**Supplemental Questions** lists supplemental questions you've added to your ProDoc installation to tailor it to your needs. You can also add, change or delete supplemental questions here. Clicking this choice brings up the Volume Selection window. Choose a volume that holds supplemental questions you've created, or one to which you want to add supplemental questions, and click **OK**. A window appears, similar to Figure 3-25. Either a list of supplemental questions you've created for the volume is shown, or the window will be blank if you are adding questions to a particular volume for the first time.

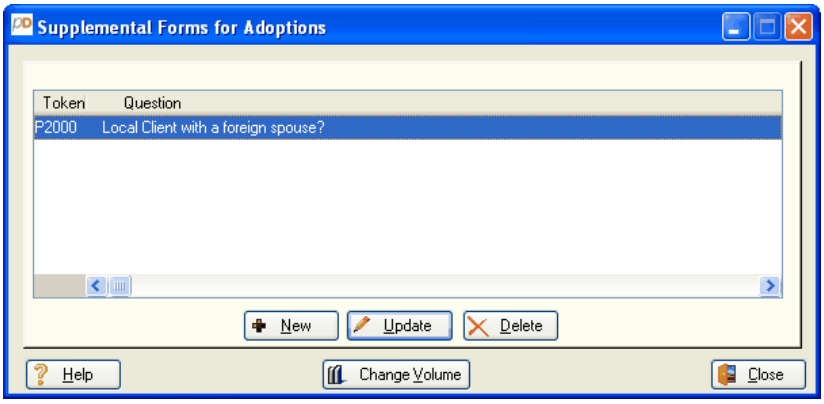



Figure 3-25, Browse Supplemental Questions

To add a new question, click **New**. To update or delete a question, click the question and click the appropriate button.

You can click the **Change Volume** button at the bottom of the window to view supplemental questions in a different volume, or add them to the volume.

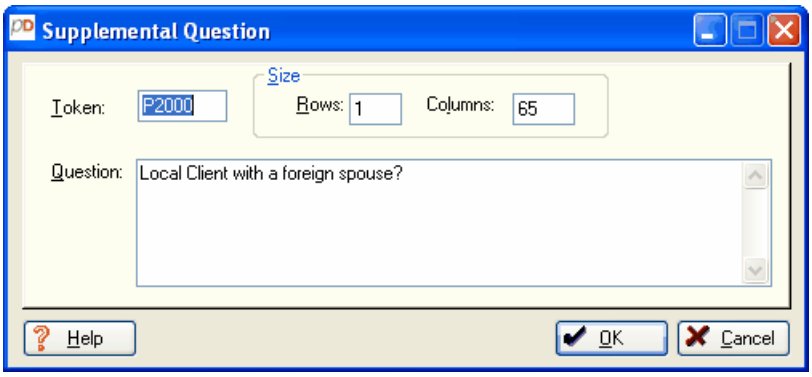



Figure 3-26, Update Supplemental Questions

When you click the **New** or **Update** buttons, a window appears similar to Figure 3-26.

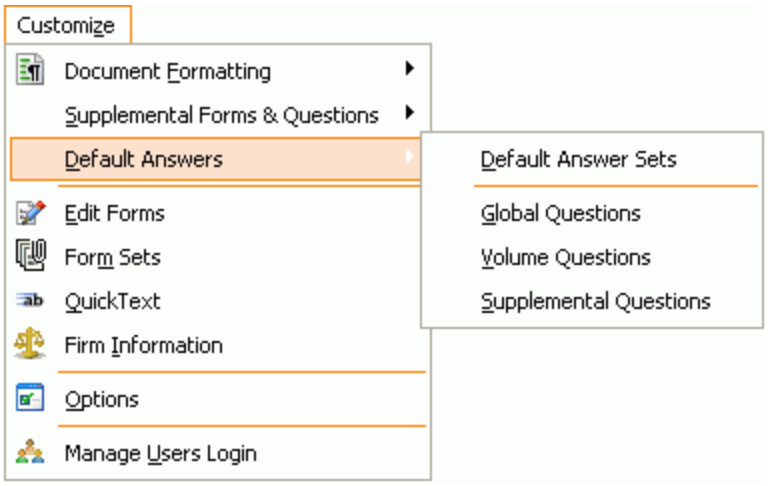
Use this dialog window to add or change supplemental questions, their tokens and size parameters.

You need to complete four fields for a new question:

- **Tokens** must only start with a P, followed by 4 alphanumeric characters, i.e. "P00A1." Special characters are not allowed.
- **Question** is the text of the question you want the user to see.
- **Rows** is the number of rows (lines) you want to make available to the user to enter an answer.
- **Columns** is the number of columns you want to give the user to answer the question. The maximum number of columns allowed is 65. The number of characters that can be entered to answer the question is generally determined by multiplying Rows by Columns.

After you have entered all the appropriate information, click the **OK** button. Your new supplemental question will now appear in the window.

## Default Answers Menu




**Default Answers** menu choices in Figure 3-27 allow you to specify the answers displayed when questions are asked by the program. This includes answers for global questions, questions for each volume, and supplemental questions. You can also use this menu to import another user's default answers. This is useful when different users must work on the same computer or support multiple attorneys.

Figure 3-27, Default Answer Sets

**Default Answers** are answers that automatically appear as the proposed answer when a question is first asked. If the default answer which appears is the correct answer, then you do not have to type or select the answer. You just accept the default answer and continue on to the next question. If not, simply make a different selection or type in the answer you want.

Many questions will often have the same answer, such as the attorney's name and bar number. You can save a tremendous amount of time and effort by setting default answers, and ProDoc makes the process of setting answers extremely easy.

**NOTE:** The procedures in this section do **not** apply to setting default answers for **Firm Information** fields, such as firm's name, address, phone/fax, email address and Web site. Click the **Firm Information in Answers** 74 link to see how to set default answers for these items.

You can scroll through the questions in a volume and set default answers for any of the questions. From the **Main Menu**, click **Customize** → **Default Answers**. This brings up the Default Answers drop down menu where you can select Global, Volume or Supplemental Questions. Global questions apply to all volumes, Volume questions apply to a specific volume (such as Family Law), and Supplemental questions are questions which you have added to a volume. For example, selecting Global Questions brings up a Set Default Answers window like the one shown in Figure 3-28. Setting default answers for Volume and Supplemental questions (if any) is done in the same manner.

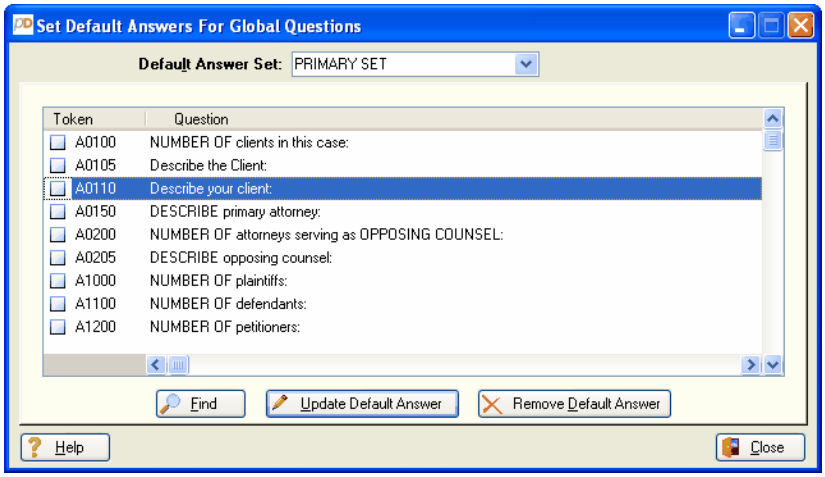



Figure 3-28, Set Default Answers for Global Questions Window

To create default answers, follow the steps below. The procedure is the same for Global, Volume and Supplemental questions, with one exception: for Volume and Supplemental questions, you must select a volume before seeing the questions.

1. Select the desired **Default Answer Set** using the drop down arrow. After selecting the set, you can scroll down and pick questions, or click **Find** to enter words to find one time or many times.

   **NOTE:** We recommend that you concentrate first on establishing defaults for your primary set. Then, when you feel that your primary set is firm, create optional sets by first copying your primary set or another user's primary set. This will save you from having to make double entries.

2. Double-click the question you want to answer, or click the question and click **Update Default Answer.**
3. In the window that appears, double-click the answer, or click it and click **OK.** You can also click **OK** to accept the highlighted answer. If the answer is a fill in the blank, type the answer or use a **QuickText** entry to answer it.
4. Repeat until you've set up all the default global answers you'd like to use.

After you've created a default answer for a question, a check mark will appear in the box next to the question in the **Set Default Answers** window. You can use the **Find** button to find a particular question. To update a default answer, highlight the question and click the **Update Default Answer** button. To delete a default answer, highlight the question and click the **Remove Default Answer** button.

Another way to set default answers is to do it during document assembly. Many users find it much easier and more convenient to set default answers this way. To do this while assembling documents:

1. Begin document assembly and work through the procedures to the question phase.
2. Select or type the answer you want to set as a default answer.
3. Click the **Set as Default Answer** button.
4. Select **Yes** on the confirmation window.

From that point forward, every time that question is first asked during document assembly, the default value will be displayed. This only changes if it is preempted by an answer you gave during a prior assembly session using the same case, or by a default answer calculated by ProDoc. To change the default answer, repeat the above steps. Also note that default answers are stored in the default answer sets. If you save answers in an optional set, the answers will only appear when you assemble documents while using the optional set.

### Creating Default Answer Sets

This menu choice allows you to create a new default answer set or add a set created by another user. This is useful in many situations that arise when different users must work on the same computer or support multiple attorneys. From the **Main Menu**, click **Customize → Default answers→ Default answer sets**. A window similar to Figure 3-29 appears.

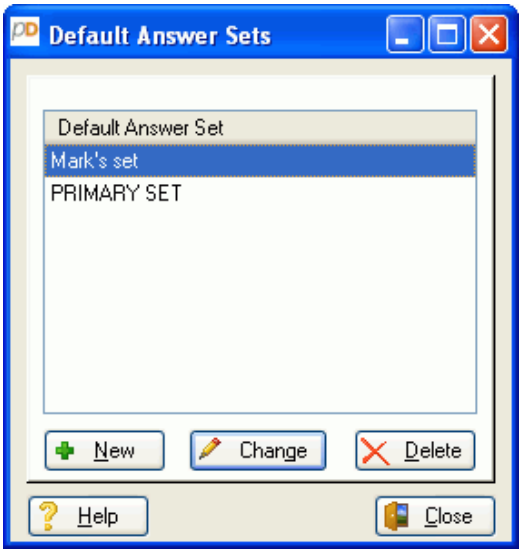



Figure 3-29, Default Answer Sets Window

This window allows you to create optional sets of default answers which you can pick from a drop-down list to use during an assembly session. For example, if a secretary prepares documents for three attorneys, a default answer set could be created for each attorney.

This doesn't change the default answer set that appears automatically during an assembly session. For help on choosing which set appears by default, see **Assembly Session Settings** 63.

The PRIMARY SET is the set containing all default answers that were entered before any optional sets were created. You can click the **New** button to create a new set, the **Change** button to change the name of the highlighted set, and the **Delete** button to delete the highlighted set.

To create a new set, click the **New** button. A **Default Answer Set Name** dialog window appears, similar to Figure 3-30. Note that if you are working in ProDoc for the first time on a new installation, there are no other user sets to copy.

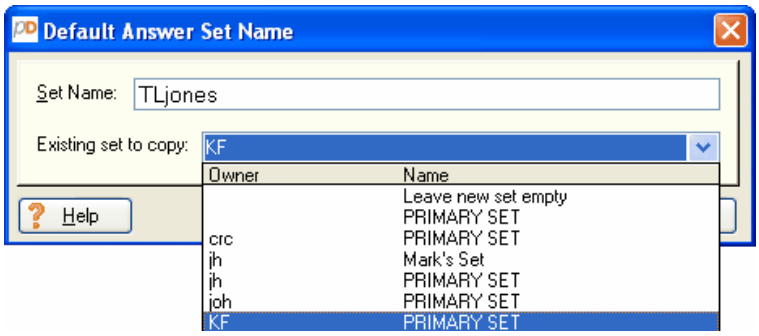



Figure 3-30, Adding a Default Answer Set

This browse window lists all of the default answer sets you can copy and use.

The **New** and **Change** buttons add new sets and change the names of existing sets, while the **Delete** button removes a default answer set from your list of sets.

Type in the **Set Name,** click the drop-down box to choose which **Existing set to copy**, then click the **OK** button. Your Primary Set and any added new sets will now appear in the **Default Answer Set** window and will be available for use when you begin assembling documents.

**Using Default Answer Sets**. You specify which default answer set to use for an assembly session when you reach Step 4 of the Starting Document Assembly window. If optional default answer sets exist, the window will contain a Default Answer Set drop-down box. Select the set you want to use from choices in the drop-down box. If no optional default answer sets exist, the window will not contain a **Default Answer Set** drop-down box, and the PRIMARY SET will automatically be used.

**Specifying the Default Answer Set for Assembly Sessions**. If you've added any optional sets, you can specify the one that appears by default during an assembly session. Click **Customize → Options**, then click the **Assembly Settings** link on the left side of the Options and Settings window. Select the set

you want to appear automatically from the drop-down list in the first field. You can still use any available set during an assembly session.

## Edit Forms Menu

**Edit Forms** allows you to edit the master forms (or form templates) used in ProDoc. Use this option to open a forms management window where you can search for forms or select a volume to find the form(s) that you wish to edit. For detailed information on editing forms, see **Appendix B** 198 and **Appendix D** 221.

## Form Sets Menu

Form sets are groups of forms that you often assemble at the same time. Using the Form Sets option, you define different sets of forms. All forms in the set can then be selected in the **Select Forms** window by selecting the form set rather than selecting each of the forms individually. For example, if you frequently prepare adoptions documents, you could define a form set called Adoption Starter, consisting of the forms in Figure 3-31. In order to select all of these forms at once, you could simply click the **Form Sets** tab in the **Select Forms** window and choose the "Adoption Starter" set.

Here is a step-by-step example showing how to create a form set:

**Creating Form Sets**.

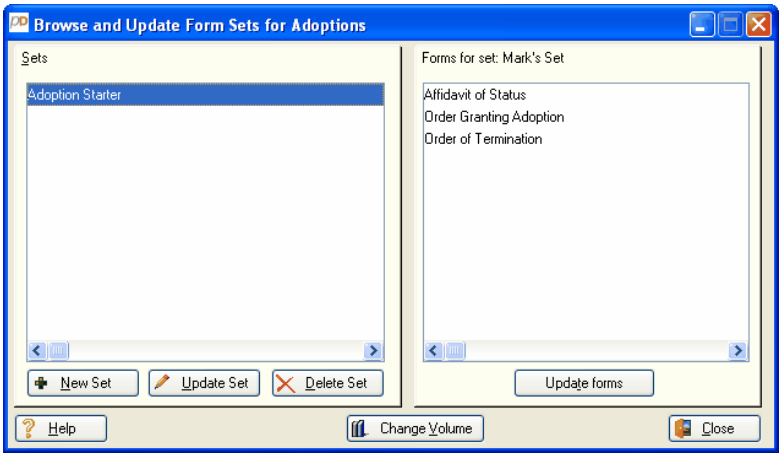



Figure 3-31, Browse and Update Form Sets Window

Click **Customize → Form Sets.** T he Volume Selection Window appears. Select the volume you want to define a form set for. For this example, click **Family Law** and click the **Select** button to select the volume. The Browse and Update Form Sets window is shown in Figure 3-31. If you need a different volume, click the **Change Volume** button.

This is where you define your form sets. The **Sets** tab lists any existing sets in the volume. The **Forms for set** tab contains a list of the forms in the highlighted form set. The **New Set** button lets you create a new form set. The **Update Set** button lets you change the name of the highlighted form set. The **Delete Set** button allows you delete the highlighted form set. The **Update forms** button lets you add or delete forms to or from the highlighted form set.

To create a form set, click **New Set.** The **Form Set Name** box appears. Type the name of the form set, "Adoption Starter", then click **OK** to return to the **Browse and Update Form Sets** window. A form set named "Adoption Starter" now exists and appears in the list of form sets. It does not yet contain any forms. To add forms to the set, make sure the set name is the highlighted form set and then click the **Update Forms** button. A **Selecting Forms** window appears. Select all the forms that you want the form set to contain. Click **OK** to accept your selections and return to the Browse and Update Form Sets window. The forms you selected appear in the forms list in the **Forms for set** tab. You may return to the main menu by clicking the **Close** button.

### Using Form Sets

Using a form set to select multiple forms to assemble is as easy as selecting a document. After selecting a volume during document assembly, a Select Forms browse window will appear. If one or more form sets have been defined for that volume, a **Form Sets** tab will be present. Click the **Form Sets** tab to see a list of the form sets. To select all of the forms in a form set, double-click the form set or highlight it and then click the **Select** button. The window will then switch to the **Selections** tab, which contains a list of all forms currently selected for assembly. If you want to deselect one of the listed forms, highlight the form and click the **Clear Selection** button. If you wish to select additional forms, click the **Numerical, Alphabetical** or **Form Sets** tab.

## QuickText Menu

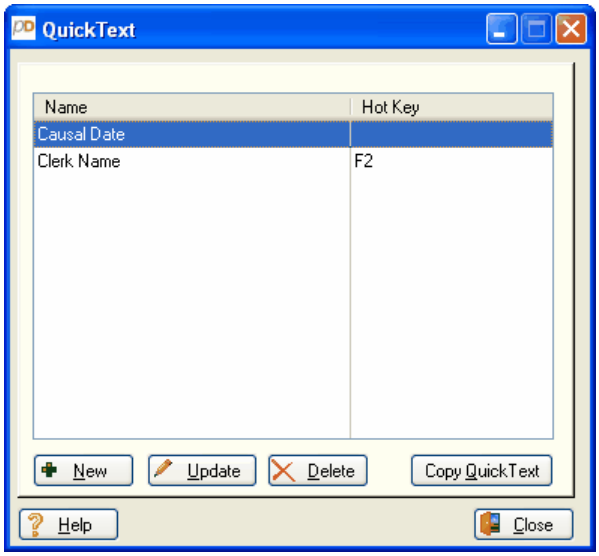



Figure 3-32, QuickText Browse Window

Click **Customize → QuickText** to see a window similar to Figure 3-32. This menu choice allows you to pre-define clauses or paragraphs you commonly use for answers. When you need to insert that clause into an answer, simply select the clause from this list. You can also set up a **QuickText** entry to automatically insert today's date. You can assign a hot key to any clause, and you can press that particular key combination to automatically insert the clause. For example, you could set up Ctrl-D as the hot key to insert today's date into an answer.

There is no limit to the number of entries you can have, and each can consist of over 3,000 characters.

The **New** and **Update** buttons add and change **QuickText** entries, while the **Delete** button removes entries. You can also double-click on the name of the **QuickText** entry to open the dialog window and edit the text string, or right click on a **QuickText** entry to bring up a drop-down menu to add, update, or delete an entry. The **Copy QuickText** button allow you to copy another user's entry for your own use.

**Add/Update QuickText Records**. To add or update a QuickText entry, click the **New** or **Update** button. The QuickText dialog box will appear. Enter the name of the QuickText entry and the text that will be pasted into the fill-in-the-blank answer. The name should be descriptive so you can easily find a QuickText entry during document assembly. Text can be entered as a single line or as multiple lines formatted as you would like it to appear in the finished document.

A QuickText entry can also be used to paste the current date rather than a fixed block of text. To create such an entry, select the **Date** option. The text field will be replaced with a drop-down box containing all the available date formats. Select the how you want the pasted date to be displayed. You may assign a hot key to any QuickText entry using the **Hot Key** drop down box.

**Delete QuickText Record**. To delete an entry, highlight it and click **Delete**. You will be asked to confirm the deletion before the entry is removed.

**NOTE:** To use a **QuickText** entry to paste a text block or the current date into a fill-in-the-blank answer, move the cursor to the point in the answer where you want the entry to be inserted.

Then click **QuickText**. This brings up the **QuickText Selection** window. Highlight the desired entry and click **Select**. The question window will appear with the entry pasted into the answer.

Alternately, you can use a hot key to paste a QuickText entry with a single keystroke. After moving the cursor to the point in the answer where you want the entry inserted, simply press the hot key for the entry. The entry will be inserted without you having to bring up the QuickText selection window.

**Copying a QuickText Entry.** Click the **Copy QuickText** button. The window that appears is depicted in Figure 3-33. This window allows you to copy other users' QuickText records for your own use. The window displays other users who've created records and the records they've created in a tree format. You can select individual records to copy, or you can copy all the entries made by another user.

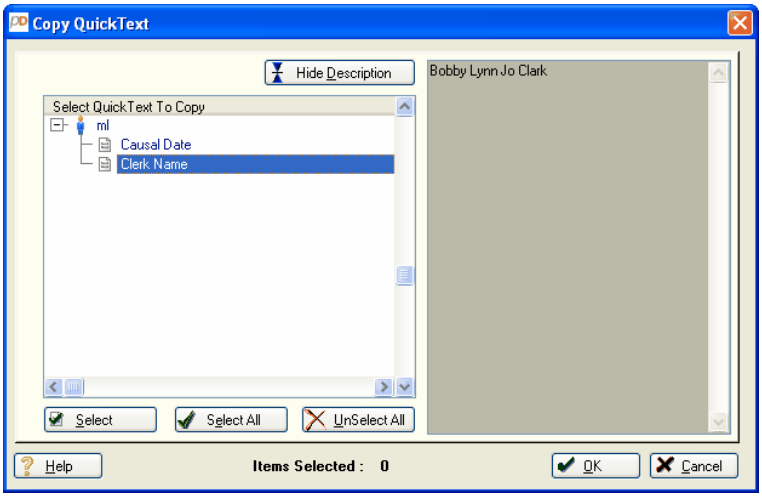



Figure 3-33, Copy QuickText Window

You can click the **Show/Hide Description** button to toggle between displaying only users (denoted by the icon) and displaying users and their records (denoted by the icon).

You can click the ⊞ icon to expand a user tree and reveal records. You can click the ⊟ icon to contract a user tree and hide the records.

To select one or more QuickText records to copy:

1. Click a record to highlight it. The actual entry will then be displayed on the right side of the window. If the entry is a date, the format for the entry will be shown.
2. Click the **Select** button to select the highlighted entry. A green check mark will appear next to the entry on the list. Repeat this process for any entries you wish to copy.
3. If you wish to select **all** QuickText entries for a particular user, click the user's login name or initials and click the **Select** button.
4. Click the **UnSelect** button to remove a highlighted entry from your selections. Click the **UnSelect All** button to remove all selections and start over.
5. When you are satisfied with your selections, click the **OK** button. A message window will appear telling you that your selections were copied. If you want to print the information displayed in this window, click the **Print** button.
6. Click the **Close** button to return to the **QuickText** browse window, where your selections will appear.

## Firm Information Menu

Click **Customize → Firm Information** to bring up the **Firm Information** box on the **Options and Settings Window** (Figure 3-34).

**(If available)**

**Information you enter here becomes part of ProDoc software's global information database and selectively becomes available for insertion for applicable questions during document assembly. Fill in all fields (except the Firm Name field, which cannot be changed here), or edit the fields as needed, and click the OK button. The required entries are Firm Name (already completed), the first Address field, City, State, Zip Code and Phone. The other fields are optional, but you should still complete the fields that apply to your firm. Enter the information carefully; this information will appear on many of your documents.**

**The Firm Name field was completed when you registered ProDoc. If you need to change the name, go to the Main Menu and click Tools → Registration → Change Firm Name. Click here 79 for detailed help with this menu choice.**

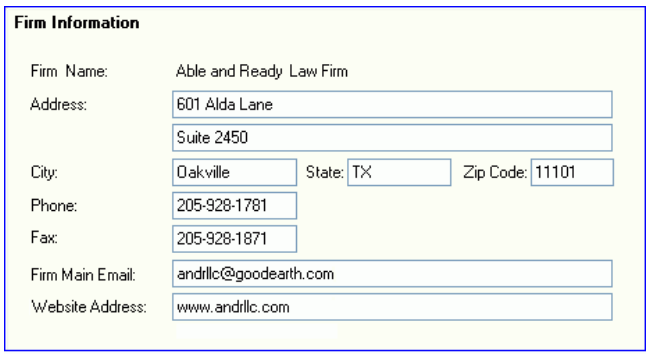



Figure 3-34, Firm Information Fields

## Options Menu

From the main menu, you can click **Customize → Options** to choose virtually all of your system settings. Each of the settings listed on the left side of the **Options and Settings** window, shown in Figure 3-35, is explained in detail in its own section, in the order shown on the window.

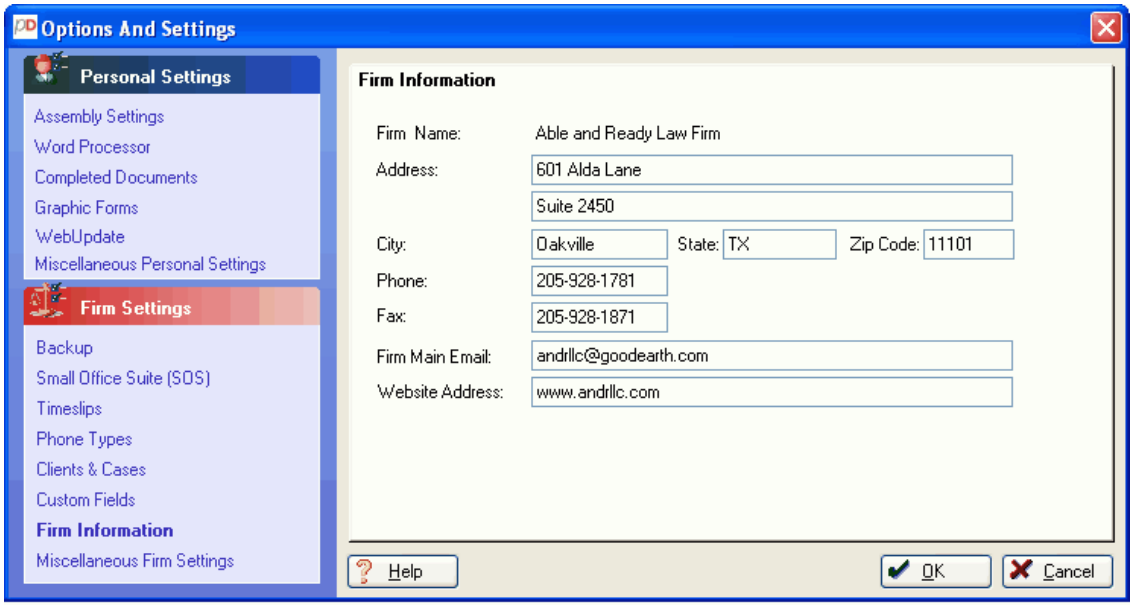



Figure 3-35, Options And Settings Window

## Assembly Settings

Click the **Assembly Settings** link on the **Options and Settings** window to bring up a box similar to Figure 3-36. These settings control the ways in which you and ProDoc interact while you assemble documents. Use the drop down arrows and check boxes to change settings as desired.

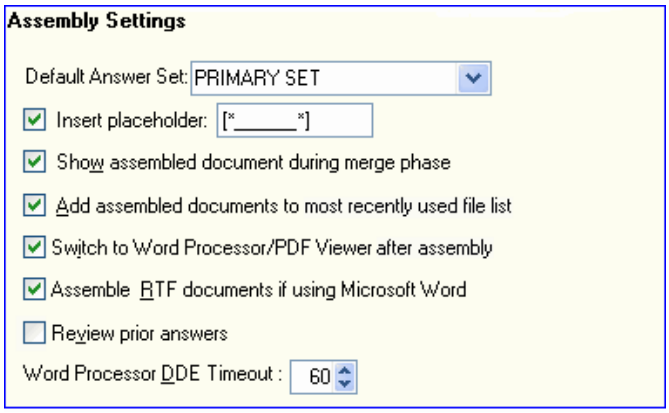

Assembly Settings
Default Answer Set: PRIMARY SET
Insert placeholder: [*_____*]
Show assembled document during merge phase
Add assembled documents to most recently used file list
Switch to Word Processor/PDF Viewer after assembly
Assemble RTF documents if using Microsoft Word
Review prior answers
Word Processor DDE Timeout : 60

Figure 3-36, Assembly Settings

This window permits you to set the following defaults:

**Default Answer Set** – The "Primary Set" appears in this field. If you have created any optional default answer sets, you can reveal these by clicking the down arrow. The set you select here will be automatically used by ProDoc when you assemble forms and print custom worksheets.

**Insert placeholder** – This field is used to tell ProDoc to insert a placeholder any place where you skipped past a question without entering an answer. You can enter anything you like here; a common entry is a long blank line, "_____".

**Show assembled document during merge phase** – The second phase of a document assembly session is called the merge phase, where you fill in blanks with names, addresses, dates, etc. If you select this option, the assembled document will be displayed on screen so that you can actually see the blank you are filling in. If you do not select this option, each question will pop up in a dialog box and you will be provided with a field to enter your answer, which will later be merged into the document.

**Add assembled documents to Word Processor's most recently used file list** – You will want to leave this checked since newer versions of WordPerfect and Microsoft Word display the most recently opened documents at the bottom of the drop-down Files menu. ProDoc automatically adds documents to that list as they are assembled if this option is selected.

**Switch to Word Processor after assembly** – After assembling documents, ProDoc can automatically start your word processor and open the file(s) just assembled. This allows you to instantly edit and print the assembled document.

**Assemble RTF documents if using Microsoft Word** – After assembling a WordPerfect document, ProDoc will convert it to RTF format if your word processor is Microsoft Word and this option is selected. You will usually want to select this option since Microsoft Word displays and prints RTF files more accurately than it displays and prints WordPerfect files. Selecting this option has no effect if your word processor is WordPerfect.

**Review prior answers** – This setting controls the default setting for the **Review prior answers** check box when you start an assembly session. If you check this box, you will be asked all document assembly questions during subsequent assembly sessions by default. If you want to skip questions you have already answered during document assembly, you will need to uncheck the **Review prior answers** box on the **Starting Document Assembly** window. If you want the most flexibility, leave this box unchecked.

**Word Processor DDE Timeout** – Leave as is. ProDoc interacts with your word processor using a process known as Dynamic Data Exchange. On some systems, particularly networks, the process of starting up a word processor and sending messages back and forth may be slower than normal. If you are having problems such as Invalid page fault, Illegal operation, etc. when ProDoc attempts to start or switch to your word processor, try increasing the value in this field by 30 seconds at a time. This tells ProDoc to wait longer before it determines that a DDE transaction failed.

## Word Processor Settings

Click the **Word Processor** link on the **Options and Settings** window to bring up a box similar to Figure 3-37. This option box allows you to change your word processor and install a ProDoc toolbar in the program.

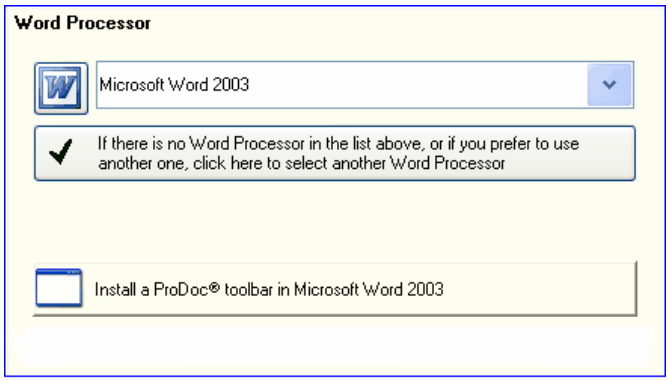

Word Processor
Microsoft Word 2003
If there is no Word Processor in the list above, or if you prefer to use another one, click here to select another Word Processor
Install a ProDoc® toolbar in Microsoft Word 2003

Figure 3-37, Word Processor Settings

This screen lets you see what word processor you are using with ProDoc. ProDoc automatically finds and sets up your word processor when it is installed. This screen allows you to change to a different word processor than the one noted on the screen. Having the correct word processor chosen is very important in controlling a number of features that help you save time in document assembly.

Normally, you will not need to change this setting. However, if you prefer to change to a different word processor or your word processor is not displayed on the screen, you may browse to the word processing program you use:

1. Click the large button titled **If there is no Word Processor in the list above, or if you prefer to use another one, click here to select another Word Processor**.
2. Two fields open underneath the button you clicked.
3. Click the drop-down arrow to the right of the top field and you will see a list of word processors to choose from. Locate your word processor on the list and highlight it. If it is not listed, click **Other.**
4. Click the folder icon that appears to the right of the **Location of Word Processor** field.
5. The **Select your Word processor** box appears.
6. Browse to the executable file for your word processor. Executable files have the extension ".exe" at the end of the file name.
7. Highlight the correct file and click **Open** to place the full command line path in the dialog box.
8. Click **OK**.

If you select **Other**, please note that ProDoc software only fully supports the use of Microsoft Word and WordPerfect. However, you can open ProDoc documents with any word processor which can open and work with WordPerfect 5.X/6.X files. ProDoc software's normal word processing interactions will not function with unsupported word processors. At a minimum, you will have to open completed documents manually.

### Installing a ProDoc toolbar in your word processor

To install a handy document manager toolbar in your word processor, click the **Install a ProDoc toolbar in…** button at the bottom of the screen. The ProDoc toolbar that now appears in your word processor features icons (with descriptive tool tip pop-ups) that perform the following functions when you click them:

Start ProDoc or toggle to ProDoc if already running.

Start a new document. A dialog window appears where you can fill in the indicated fields. You can associate your new document with an existing ProDoc client and case for tracking purposes. Click the drop down arrow to the right of each field to select the client and case.

Open an existing document.

Save the opened document.

Search for documents using key words or advanced matching options.

### Removing the ProDoc toolbar and menu choice from WordPerfect

To remove the ProDoc toolbar and menu selection from WordPerfect, open WordPerfect. On the menu, click **Edit** and then **Settings**. Click the **Customize** icon in the Settings box. The Customize Settings box appears. To remove the ProDoc toolbar, select the **Toolbars** tab and remove the check from the ProDoc Organizer check box. To remove the ProDoc menu selection, select the **Menus** tab and highlight **ProDoc Organizer**. Click **Delete** and then click **Close**.

### Removing the ProDoc toolbar and menu choice from Word

To remove the ProDoc toolbar and menu selection from Word, open ProDoc and click **Customize ? Options.** Click the **Word processor** link on the left side of the window. Click the **Remove Word Processor Toolbar** button.

## Completed Documents Settings

Click the **Completed Documents** link on the **Options and Settings** window to bring up a box similar to Figure 3-38. This option box allows you to specify file locations for finished documents; choose a folder naming convention; and choose a default file name type.

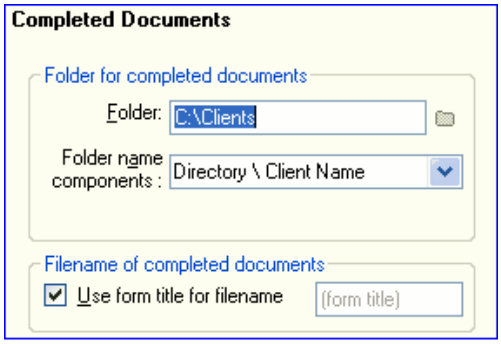



Figure 3-38, Completed Documents Settings

Use this window to specify the way you want ProDoc to work during a document assembly session. The following default options can be set from this window: Folder for Completed Documents 66 and Filename of completed documents 66.

**Folder for Completed Documents**

**Folder –** The location specified in this window is used as the default location in the Starting Document Assembly window. Generally, this will be something like F:\clients if you are a Network user or C:\Clients if you are single user. If you want to choose the directory from a browse listing, click the browse button to the right of the box and select the drive and directory from the directory browse window. Any path components specified above are appended to the directory.

**Folder Name Components** – You can choose to store assembled documents in subfolders under the folder specified above. Subfolders will be based on the client name or client ID and the case description or case ID for the client and case selected for the assembly session. To select the components to use, click the down arrow to open the drop down list box. To select a path component set from the list, click it. The following list shows the locations that correspond to the various path component sets with a folder of "F:\clients" for an assembly session using the client "John J Smith" with a client ID of "ALS-SJJ-123" and the case "Divorce" with a case ID of "SJJ-DIV".

**Folder Name Components....Location**

Directory\Client Name....F:\clients\Smith, John J

Directory\Name\Case Description....F:\clients\Smith, John J\Divorce

Directory\Client Name\Case ID....F:\clients\Smith, John J\SJJ-DIV

Directory\Client ID....F:\clients\ALS-SJJ-123

Directory\Client ID\Case Description....F:\clients\ ALS-SJJ-123\Divorce

Directory\Client ID\Case ID....F:\clients\ALS-SJJ-123\SJJ-DIV

Directory\Case Description....F:\clients\Divorce

Directory\Case Description\Client Name....F:\clients\Divorce\Smith, John J

Directory\Case Description\Client ID....F:\clients\Divorce\ ALS-SJJ-123

Directory\Case ID....F:\clients\SJJ-DIV

Directory\Case ID\Client Name....F:\clients\SJJ-DIV\Smith,John J

Directory\Case ID\Client ID....F:\clients\SJJ-DIV\ALS-SJJ-123

**NOTE:** Any blank components, such as a blank Case ID, are omitted. If no case is used for the assembly session, no components are appended to the folder.

**Filename of completed documents.** By default, the **Use form title for filename box** is checked. When this box is checked, ProDoc will use the title of the form as the filename of the document you assemble. The filename cannot be changed in the Starting Document Assembly window. Also, fields for entering filenames for clients and cases will be removed from the Client Dialog Window and Case Dialog Window.

If you remove the check from this box, you can specify a filename for all documents you assemble in the field provided. You can change this filename in an assembly session.

If you assemble the same document for a case more than once, ProDoc will use the filename you specify and add "-#2" to the filename. The numerals advance as instances occur.

## Graphic Forms Settings

Click the **Graphic Forms** link on the **Options and Settings** window to bring up a box similar to Figure 3-39. The options here let you customize settings for filling, completing and printing graphics-type forms.

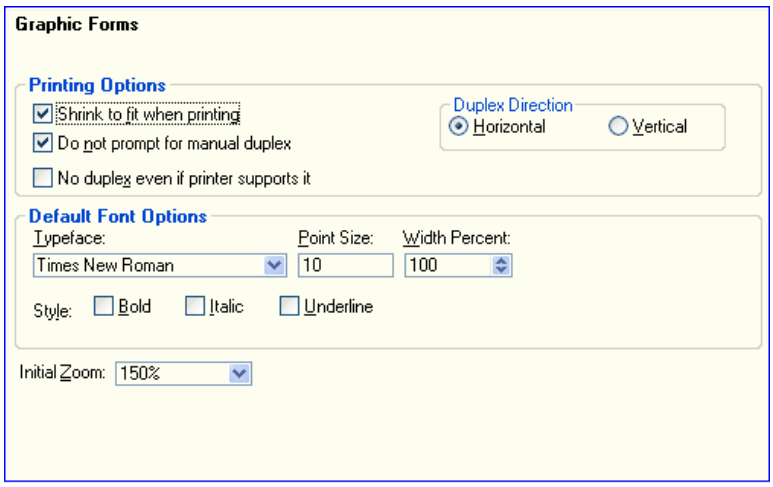



Figure 3-39, Graphic Forms Settings

This window allows you to customize settings for completing and printing graphics forms. In most cases, the default settings will result in an excellent finished product. A description of the fields and choices follows:

**Shrink to fit when printing** - ensures graphic forms designed for one page actually print on one page without border breaks to a second page.

**Do not prompt for manual duplex** - this refers to a prompt which will ask you if you want to print on both sides of the paper. When this box is checked, the prompt is disabled.

**No duplex even if printer supports it** - when checked, disables printing on both sides of a page.

**Duplex Direction** - can be **horizontal** or **vertical**. Horizontal will result in a two-sided printed page that you can pick up from the bottom to read the back. Vertical will print the back so that you can flip the right edge and read the back.

**Typeface** - identifies the default typeface for filling a form. You can change this typeface by clicking the drop-down arrow in the field and clicking on a different typeface.

**Point Size** - One point is 1/72nd of an inch, so 12 point type would be 1/6th inch high. Standard sizes for most correspondence is 10 point or 12 point type. You can change this by manually typing the entry in the field.

**Squish Percent** - the relative size of the form's width as it is displayed in ProDoc. You can change this with the spin button or by typing the percentage you want in the field.

**Style** - Can be set to normal (nothing checked) or **Bold**, **Italic**, or **Underline**. To use a style, click the box next to the style you want to use.

**Initial Zoom** - the relative size of the entire form as it is displayed in ProDoc. You can change this by using the drop-down arrow and selecting the percentage you want from the choices displayed.

## WebUpdate Settings

**WebUpdate** runs automatically the first time ProDoc is opened, by default. When you start ProDoc, the program checks the ProDoc server for updates. If updates are available, a window is displayed listing these updates. You can change the setting by clicking **Customize → Options → WebUpdate** and checking or clearing the **Disable WebUpdate** check box. If you disable **WebUpdate,** you can manually check for updates anytime by clicking **Tools → Check for Updates.**

If the feature is enabled, the program will check the ProDoc software's online server for updates needed for your installation when you initially run ProDoc each day. A box will appear indicating that ProDoc is checking for updates. If no updates are found, the box closes. If updates are available, the **Updates for ProDoc are now available** window appears. You have three choices on this window:

- Click **Download and Apply All Updates** to download all updates. The updates will be

downloaded, and a window will be displayed which tells you the updates have been downloaded. You will be prompted to restart ProDoc to install the updates. After ProDoc restarts, the downloaded updates will be installed.

- Click **Select Updates to Download and Apply** to open a window displaying available updates and a description of each update available. The selection box for each update will be checked. We recommend you download each available update. If you want to exclude an update from download, click the update's check box to clear it, and the update will not be downloaded. Click **Begin Download** to download the selected updates. If you don't want to download updates at this time, click **Cancel.**
- Click **Do Not Download Updates at this time** to close the update window without downloading any updates.

## Miscellaneous Personal Settings

Click the **Miscellaneous Personal Settings** link on the **Options and Settings** window to bring up a box similar to Figure 3-40. These options include the ability to show/not show the Quick Start Assistant or the Quick Click Menu; use/not use the ProDoc software's PDF Reader to view Adobe PDF documents; and restore ProDoc software's original window positions for all windows.

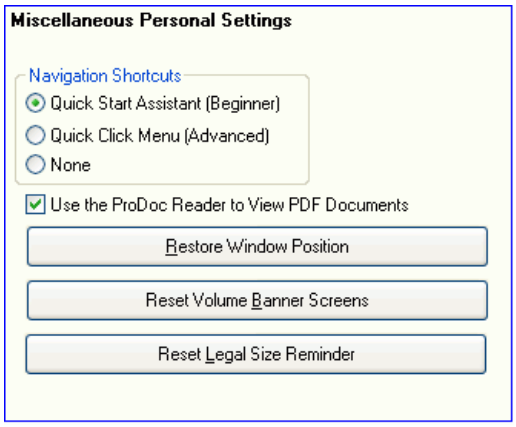



Figure 3-40, Miscellaneous Personal Settings

This window allows you to set miscellaneous defaults that only take effect when you log in to ProDoc.

**Quick Start Assistant (Beginner)** - When this button is selected, ProDoc automatically brings up the Quick Start Assistant for your use after you log in. This is recommended for beginning users.

**Quick Click Menu (Advanced)** - When this button is selected, ProDoc automatically brings up the Quick Click Menu for your use after you log in. This is recommended for users who are familiar with the program.

**None** - When this button is selected, neither of the above starts.

**Use the ProDoc PDF Reader to view PDF Documents** - When checked, ProDoc will use its embedded PDF reader to view PDF documents. If unchecked, Adobe Reader or another program you've designated on your computer to open PDF documents will start and display PDF documents when you select these while working in ProDoc. If you have Adobe Reader, you would normally want to uncheck this box.

**Restore Window Position** - Click this button to reset all ProDoc windows to appear in their original positions and size.

**Reset Volume Banner Screens** - Click this button to have ProDoc display volume banner screens when you assemble documents.

**Reset Legal Size Reminder** - Click this button to set the legal size paper reminder for printing on and off.

## Backup Settings

Click the **Backup** link on the **Options and Settings** window to bring up a box similar to Figure 3-41.

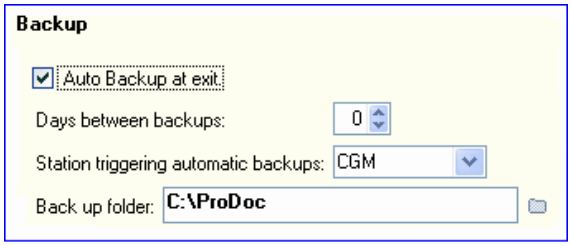



Figure 3-41, Backup Settings

The choices on this window control backup settings. We recommend you use the settings shown in Figure 3-41 unless you are a Small Office Suite user.

**Auto Backup at exit** - If you do **not** use SOS, you should ensure this option is selected. If this option is selected, ProDoc will periodically automatically make backup copies of client and case data files when you exit ProDoc. The backup copies are stored in the ProDoc home directory by default, but you can save these in any valid drive/folder by changing the entry in the **Backup folder** field. **SOS subscribers should leave this box unchecked**. This is recommended because SOS backs up more data files, and using ProDoc backup and restore can damage SOS data files.

If you have SOS installed and you select **Auto Backup at exit**, you will see a warning screen when you click **OK** on this window. The warning tells you that you should use SOS for backing up your data. The warning screen provides a **Disable Backup** button to disable automatic backup in ProDoc. If you click the button, you will see a window confirming that the automatic backup is disabled. The window will also ask you to enable automatic backup in SOS.

If **Auto Backup at exit** is not selected, the remaining fields here are disabled.

**Days between backups** - Specifies how many days to skip between performing automatic backups. No backup is done if the difference between the current date and the date of any existing backup copies is less than the frequency. If the frequency is zero then a backup is always done.

**Station triggering automatic backups** - Ensure that this field contains the log in identification of a person in your office who regularly uses ProDoc.

**Backup folder** - Specifies the folder which receives backup data files. The default is the ProDoc installation folder. You can type in another folder name or use the browse folder button next to the field to select another folder.

## Small Office Suite (SOS) Settings

Click the **Small Office Suite (SOS)** link on the **Options and Settings** window to bring up a box similar to Figure 3-42. The box helps you designate amounts to charge, using SOS charge slips, for assembled documents. If you have SOS installed, you can designate billing amounts for documents and automatically generate charge slips when you complete a document. See the **SOS Manual** for detailed help in setting up billing options and using charge slips in SOS.

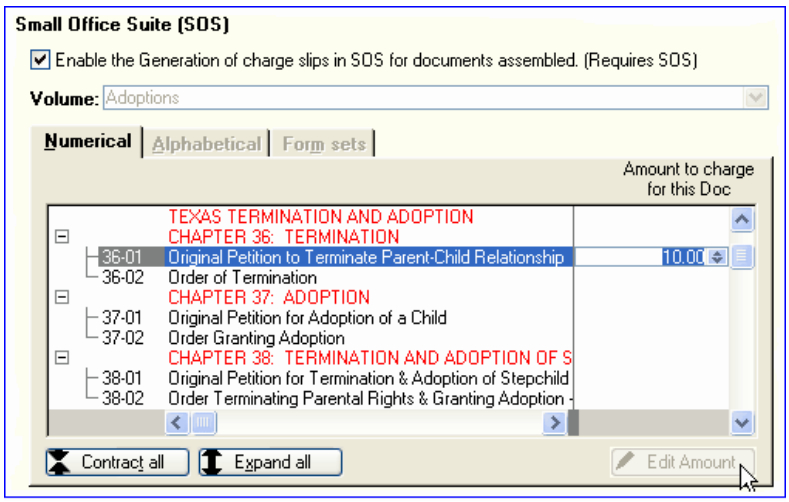

Small Office Suite (SOS)
Enable the Generation of charge slips in SOS for documents assembled. (Requires SOS)
Volume: Adoptions
Numerical
Alphabetical
Form sets
Amount to charge for this Doc
TEXAS TERMINATION AND ADOPTION
CHAPTER 36: TERMINATION
36-01 Original Petition to Terminate Parent-Child Relationship 10.00
36-02 Order of Termination
CHAPTER 37: ADOPTION
37-01 Original Petition for Adoption of a Child
37-02 Order Granting Adoption
CHAPTER 38: TERMINATION AND ADOPTION OF S
38-01 Original Petition for Termination & Adoption of Stepchild
38-02 Order Terminating Parental Rights & Granting Adoption
Contract all
Expand all
Edit Amount

Figure 3-42, SOS Settings

**Enable the Generation of billing slips in SOS for documents assembled. (Requires SOS)** – Place a check in this box if you would like to enable the feature that allows you to automatically bill your clients in SOS for the documents that you assemble. To select documents and specify amounts:

1. Choose a **Volume** by clicking on the drop down arrow field.
2. Arrange the list of volume forms either by **Numerical** or **Alphabetical** order by clicking the appropriate tabs.
   a. If you list forms numerically, you can also use the **Contract All** or **Expand All** buttons to reveal chapters only or all forms grouped by chapters.
   b. In a numerically ordered list, you can also click the ⊞ button or ⊟ button to reveal or hide forms in a chapter.
3. If desired, you can click the **Form Sets** tab to display a form set you've created. You can then specify the amount you want to charge for the complete set.
4. Select the desired form by clicking it once. Click the **Edit Amount** button and enter the desired dollar amount to charge for assembling the document.
5. Repeat the process as needed.

### Generating Charges in SOS for Completed Documents

If you have enabled the feature, the **Charges to Generate In SOS** window appears after you have assembled one or more documents listing an amount to charge. This window only opens if you used a case file. The information that appears on the screen is the **Activity/Doc Name, Fee Charged** and **Timekeeper.**

If a **T** appears before a charge on the list, it means that the charge will not be billed but will be **tracked** for the case. If a **B** appears before a charge on the list, it means that the item will be billed to the case. You may choose whether to **Track** or **Bill** charges by highlighting the charge and clicking on the **Track this Charge (Will Not Generate a Billable Slip)** or **Bill this Charge (Will Show as a Billable Slip)** buttons that appear in the **Charge Tracking/Billing** field of the **Charges to Generate In SOS** window.

Highlight a charge and click the **Edit Charge** button to adjust the **Activity Name, Fee** or **Timekeeper.** If you want to remove the charge so that it does not appear in the **Charges to Generate In SOS** window, highlight the charge and click the **Delete Charge** button. Clicking the **Consolidate All** button will allow you to generate one flat fee slip for the total amount of the documents that have been assembled instead of separate slips for each document's specified amount. Click **Generate Charges** to create SOS billing slips for the documents that have been created. Click **Cancel Charges** to close the

**Charges to Generate In SOS** window.

## Timeslips Settings

Click the **Timeslips Settings** link on the **Options and Settings** window to bring up a box similar to Figure 3-43. This window is only applicable for Timeslips version 9.1 and newer users who have interfaced Timeslips with ProDoc. Use this window to set up phone types and name mapping .

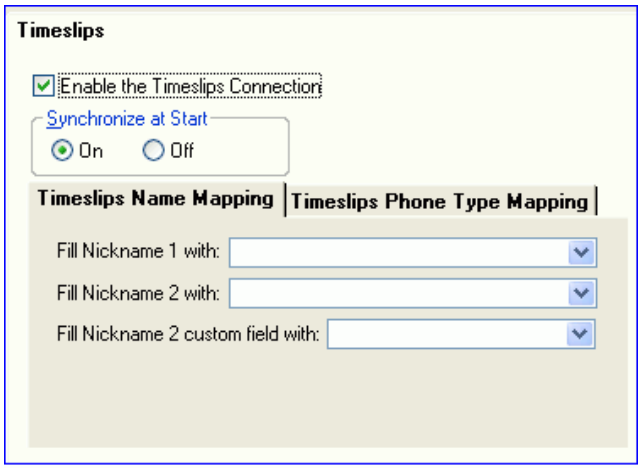



Figure 3-43, Timeslips Settings

For detailed help with synchronizing Timeslips and ProDoc, see **Appendix C** 208 of this manual.

This window is only applicable for **Timeslips version 9.1 and newer** users who have interfaced Timeslips with ProDoc.

The Timeslips extension gives you the ability to bill your clients by generating "slips" for each document created in ProDoc. Generating a slip takes place after document assembly in ProDoc and before the document is opened in the word processor.

**CAUTION: Do not use ProDoc with a version of Timeslips (e.g., Timeslips Express) that does not allow you to use "project separators". "Project separators" distinguish clients and cases. Using ProDoc with a version of Timeslips that does not use "project separators" will cause the loss of important data.**

**Enable the ProDoc to Timeslips Connection the next time ProDoc is started. (Requires Timeslips)** – Place a check in this box if you would like to enable the feature that allows you to synchronize Timeslips and ProDoc for client and document billing purposes.

**Synchronize at Start** – Click the **On** button to have ProDoc automatically start the synchronization of Timeslips and ProDoc data when you start ProDoc. Click the **Off** button to synchronize data only when you choose to do so.

Use this window's **Timeslips Name Mapping** tab to match the Nickname 1, Nickname 2, and Nickname 2 custom field parameters in Timeslips to match the corresponding fields in ProDoc. Select the entry types with the drop down arrows next to the fields. If you leave these fields blank, Timeslips will use Client and Case IDs for the Nickname1 field.

Use the **Timeslips Phone Type Mapping** tab to match the Timeslips and ProDoc phone type fields. Select the phone types using the drop down arrows next to the fields.

## Phone Types Settings

Click the **Phone Types** link on the **Options and Settings** window to bring up a box similar to Figure 3-44. Timeslips users can use this tab to change the order of phone number listings to conform with the

scheme in Timeslips. ProDoc allows you to store many phone numbers for a client. Timeslips limits this option to four phone numbers.

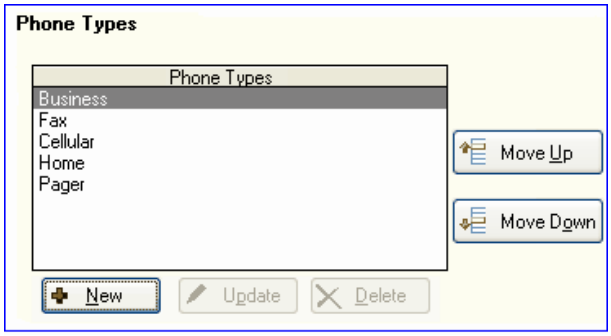



Figure 3-44, Phone Types Settings

Use this window to insert, change or delete phone types for your contacts with the controls provided.

From the **ProDoc Options** Window, Timeslips users can use the convenient **Move Up** and **Move Down** buttons to adjust the order of the various phone types to properly match the ProDoc software's phone listings with those in Timeslips. Changing these settings will also determine how phone types are displayed when you add or update phone types for clients.

You can use the **New**, **Update** or **Delete** buttons to add, change or delete phone types. Any new phone types you create can be updated or deleted. **Home**, **business** and **fax** phone types cannot be deleted or updated.

## Clients & Cases Settings

Click the **Clients & Cases** link on the **Options and Settings** window to bring up a box similar to Figure 3-45. This box allows you to specify the use of unique IDs to identify clients and cases.

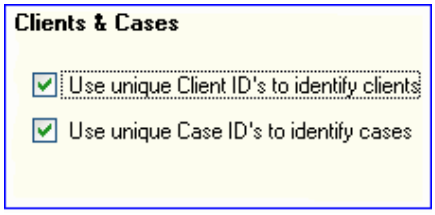



Figure 3-45, Clients & Cases Settings

This window allows you to use or not use unique IDs for clients and cases.

**Use unique Client IDs to identify clients – (Mandatory for Timeslips users) -** Click this box to specify a client ID for each client. This requires that each client ID be unique (no duplicates). If you plan to use an ID for each client, you should check this box to ensure no two clients share the same ID. An example of a client ID could be 2005-ALS-2311, which would show the year the client was opened, the attorney who opened it and the actual client number. If you turn this feature on, then when adding a new client to the system, the client ID field must be left blank or a unique number must be entered.

**Use unique Case IDs to identify cases – (Mandatory for Timeslips users) -** Similar to the client ID above, this allows you to specify a case ID for each case. The case ID must be unique (no duplicates) for each client, although different clients can share the same case ID (two clients can have a case ID called divorce). If you plan to use an ID for each case, you should check this box to ensure no two cases for the same client share the same ID. If you turn this feature on, then when adding a new case to the system, the case ID field must be left blank or a unique number must be entered.

Leave either box blank to let ProDoc know you don't want to use client or case IDs. This will prevent the fields for these items from being displayed on client and case add/update windows.

## Custom Fields Settings

Click the **Custom Fields** link on the **Options and Settings** window to bring up a box similar to Figure 3-46. This box lets you build up to six separate custom fields for Clients and Cases. Simply type in any desired Client fields, such as "SSN", in the space provided, or type in Case custom fields such as "Opposing Counsel". Then click **OK**.

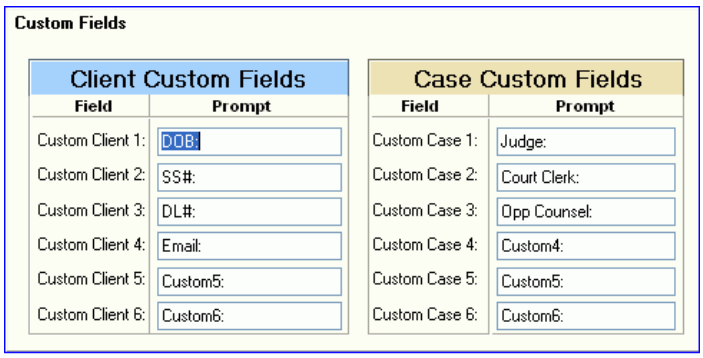



Figure 3-46, Custom Fields Settings

## Firm Information Fields Settings

**(If available)**
Click the **Firm Information** link on the **Options and Settings** window to bring up a box similar to Figure 3-47. This box lets you enter or edit relevant firm information **(except your Firm Name, which cannot be changed here)** so you can avoid entering it on each document, form or report.

**The Firm Name field was completed when you registered ProDoc. If you need to change the name, go to the Main Menu and click Tools → Registration → Change Firm Name. Click here** 79 **for detailed help with this menu choice.**

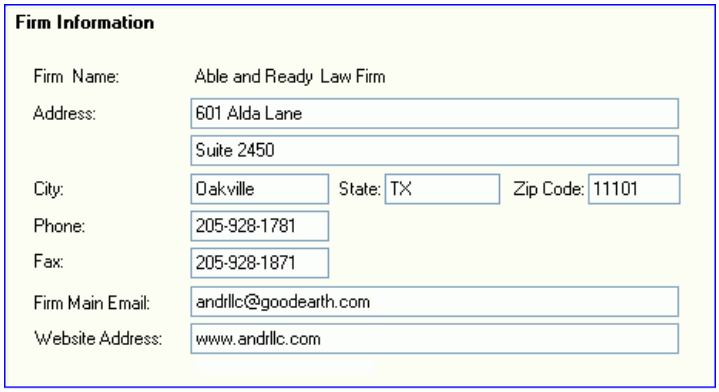



**Figure 3-47, Firm Information Settings**

**(If available)**

The required entries are **Firm Name (already completed)**, the first **Address** field, **City, State, Zip Code** and **Phone.** The other fields are optional, but you should still complete the fields that apply to your firm. Enter the information carefully; this information will appear on many of your documents.

## Firm Information in Answers

The **Firm Information** fields are entered when you install ProDoc. The information in these fields **overrides** any changes made by setting default answers or changing case answers. ProDoc will always display the current firm information as the suggested/displayed answer during assembly sessions.

This applies to all **Firm Information** fields, including firm name, address, city, state, zip code, phone/fax numbers, email and Web site name.

**(If available)**

**Changing Firm Information Default Answers. To change the default answer for the Firm Name, you must click Tools → Registration → Change Firm Name.** To change default answers for all other firm information fields, you must click **Customize → Firm Information** and make the changes on the **Options And Settings** window.

## Miscellaneous Firm Settings

Click the **Miscellaneous Firm Settings** link on the **Options and Settings** window to bring up a box similar to Figure 3-48.

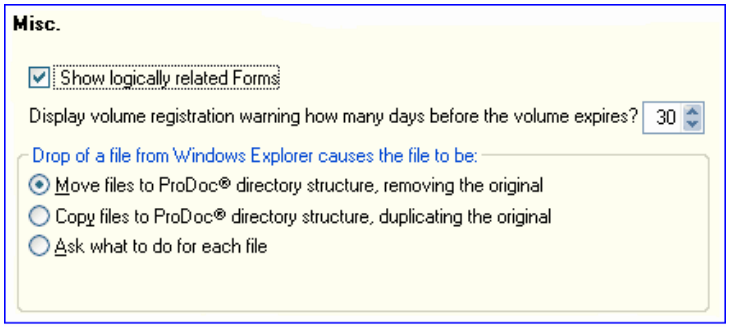

Misc.
Show logically related Forms
Display volume registration warning how many days before the volume expires?
30
Drop of a file from Windows Explorer causes the file to be:
Move files to ProDoc® directory structure, removing the original
Copy files to ProDoc® directory structure, duplicating the original
Ask what to do for each file

Figure 3-48, Miscellaneous Firm Settings

This window allows you to specify settings for revealing related forms during an assembly session; lead time for warnings about volume expiration; and how to handle Windows Explorer file moves.

**Show logically related Forms** – If this box is selected, ProDoc will note when you fail to select a form logically related to the form you've chosen during an assembly session or when defining a form set. The **Select Forms** window will appear to give you another chance to select logically related forms.

**Display volume registration warning how many days before the volume expires?** - Use the spin buttons here to select the lead time for getting a warning that a volume is going to expire. The warning will start appearing when a volume's expiration date reaches the number of days that you have set in this field.

Use the selections under **Drop of a file from Windows Explorer causes the file to be:** to tell ProDoc how you want the source and destination file to be treated while using Windows Explorer for drag and drop operations in the Document Manager. For more information on these settings and the drag and drop function, click **here** 39.

# Tools Menu

This menu choice brings up useful utility programs which perform external and housekeeping tasks.

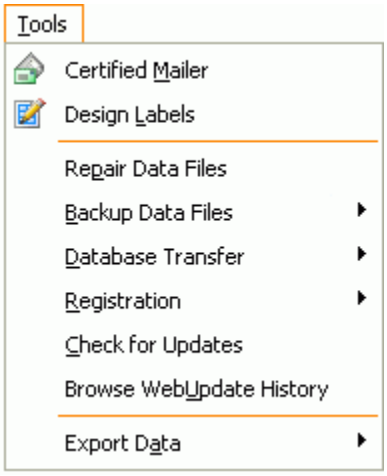



Figure 3-49, Tools Drop-Down Menu

**Certified Mailer** 76 opens the Certified Mailer program to help you create and print certified mail labels for your certified letters and packages.

**Design Labels** 77 brings up a pick list of available label formats.

**Repair Data Files** 77 is a utility you can use whenever you suspect a data file is damaged.

**Backup Data Files** 78 lets you backup or restore data files.

**Database Transfer** 78 enables you to transfer contact data files to a system using ProDoc which doesn't already have access to your files. You can also import contact data that was exported from another ProDoc system.

**Registration** 79 lets you manage all licensing and registration for ProDoc, including volumes and PowerPacks.

**Check for Updates** 83 lets you check the ProDoc **WebUpdate** server for any updates your installation needs. Simply follow the prompts to automatically download and install the updates you need.

**Browse WebUpdate History** 83 lets you open a window to display a history of all updates you've downloaded. If you want to see updates that you have not downloaded, uncheck the box labeled **Display only downloaded updates.**

**Export Data** 84 lets you export contacts, cases and answers to questions. This is useful if you expand ProDoc to another computer system.

## Certified Mailer

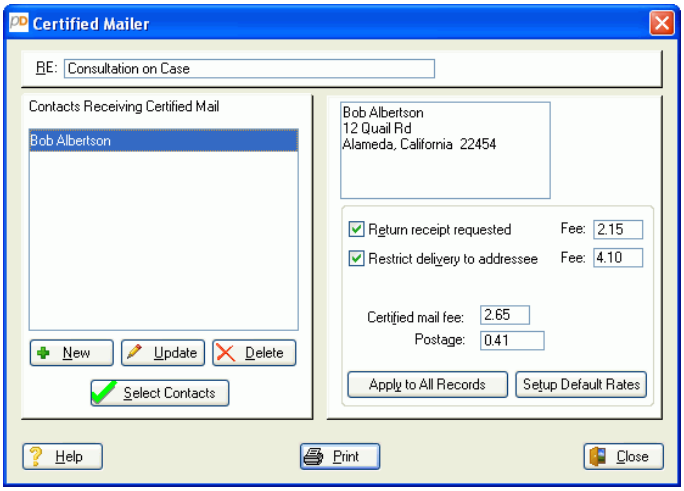



Figure 3-50, Certified Mailer Window

Law offices normally send a large amount of certified mail. The **Certified Mailer** feature makes it easy to produce certified mail labels by automating the process. Figure 3-50 depicts the Certified Mailer window.

You can quickly choose clients from your database, or you can add addressees that are not in your database.

Before you can use this feature, you will need to purchase certified mail shipping labels. You can buy labels from most office supply stores. The certified mailer program works well with Walz™ Form 35663 Certified Mailer forms.

To produce certified mail labels:

1. From the **Main Menu**,click the **Cert. Mailer** button or **Tools → Certified Mailer**. Type in the subject of the mail in the **RE:** box at the top.
2. If you need a label for one or more contacts in your database, click **Select Contacts**. The **Select Contacts** window appears, similar to Figure 3-51.

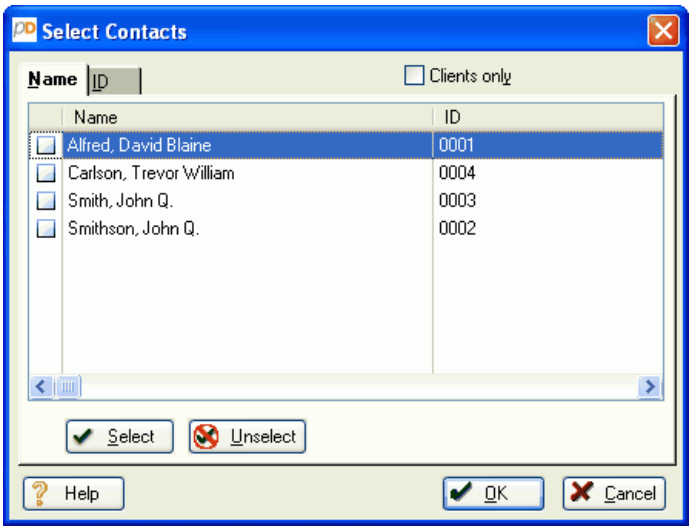



Figure 3-51, Select Contacts Window

Select the contact by clicking in the box next to the name(s), or by highlighting the name(s) and clicking the **Select** button. If you want to limit your choices to clients only, click the **Clients only** box.

Click the **Unselect** button to remove a previous choice. Click **OK**.

3. The contact(s) will appear in the Certified Mailer box as receiving the certified mail. Repeat as needed.
4. If you need to add addressees who are not in your ProDoc database, click the **New** button and enter their address. Click **OK.** Repeat as needed.

   **NOTE:** Any person(s) and mailing addresses you add here do **not** become a part of your ProDoc client database.

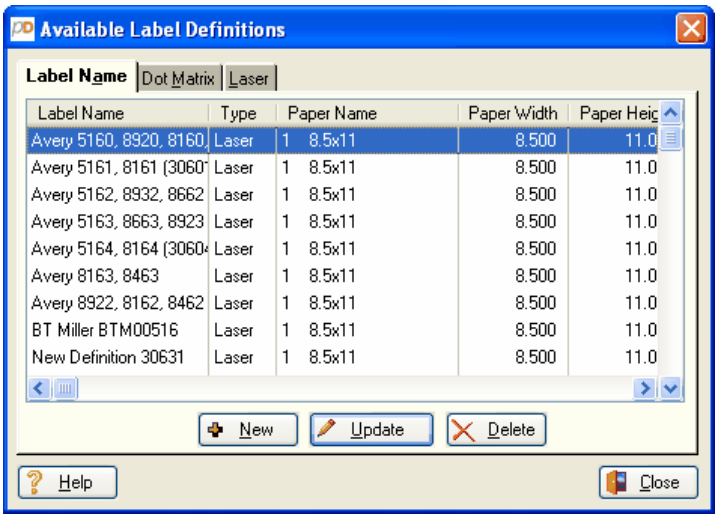
5. Choose **Return receipt requested** or **Restrict delivery to addressee** as desired by clicking in

the boxes. Enter or change the fees using the appropriate boxes.

6. Determine the certified mail fee and postage. You can enter these for each addressee by clicking on the name on the left side of the window, then entering amounts in the boxes on the right side of the window. You can also click **Apply to all records** to apply what you've entered to everyone receiving the mail. Use **Setup Default Rates** to set options and amounts for future use.
7. Review your selections. You can change options, addresses and amounts by highlighting the addressee and making the desired changes on the right side of the window. You can also do this in a separate window by highlighting the name and clicking **Update.** Click **OK** to return to the Certified Mailer window.
8. Click **Print.** You'll see a printer report destination window. Choose your printer and any other preferences, then click **OK.**
9. A warning screen will remind you to insert the appropriate number of Certified Mail labels into your printer. Do this, then click **OK.**

## Design Labels

ProDoc has several common label definitions pre-defined for you to choose from. However, if you want to create a custom label definition, the easy to use interface is here. From the **Main Menu,** click **Tools** → **Design Labels.** A window appears, similar to Figure 3-52.




You may create, update or delete label definitions from this window. The label definitions you create control the size and type of labels you use.

Design options include label type, paper type (height and width), type of printer used, label height and width, margins, and offset dimensions.

Figure 3-52, Available Label Definitions Window

If you click the **Label Name** tab, a list of all label definitions displays. If you click the **Dot Matrix** tab, only label definitions for dot matrix printers will display. If you click the **Laser** tab, only label definitions for laser printers will display.

To create a new label definition, click **New**. The **Adding a label definition** window appears. Provide the requested information. You may update a label definition by highlighting it, clicking the **Update** button and making the changes you desire. To delete a label definition, highlight it and click **Delete**.

## Repair Data Files

The **Repair Data Files** utility lets you attempt to repair a data file which has somehow been damaged.

**CAUTION: Under normal circumstances you will not have occasion to use this utility. It has been included to facilitate repair of data files with direct assistance from one of our Customer Support staff. Accordingly, before using this utility, we recommend that you first call (800) 759-5418 and ask to speak with one of our Support Technicians who will help guide you through the process.**

## Backup Data Files

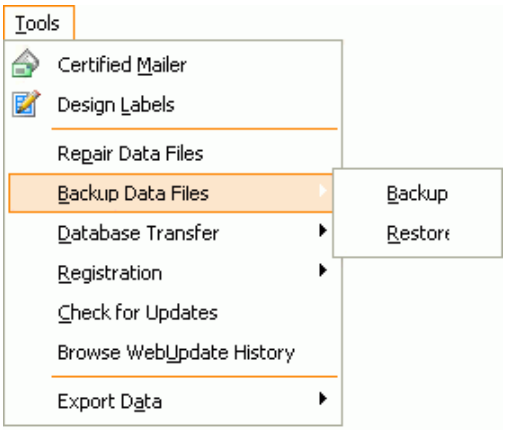



Figure 3-53, Backup Data Files Menu

Selecting this option will reveal another drop down box with two options, **Backup** and **Restore**, as shown in Figure 3-53.

These are used to manually backup your data files or restore your data files from a previous backup location.

- If you select the **Backup** option, ProDoc makes a backup copy of client and case information files to the location you specify on the window that appears. This location can be a floppy disk, a directory on a standard hard drive or a network location.
- Similarly, in the event of system failure, file corruption or other reasons, you may elect to click **Restore** from the main screen menu to restore the client and case information backup file back to the ProDoc home directory. In this case, this window should reflect a **Backup from** location which is usually the same floppy disk or hard drive you previously backed up to.

**NOTE:** The **Backup** and **Restore** menu options are disabled while other ProDoc tasks that use the case information files are running.

## Database Transfer

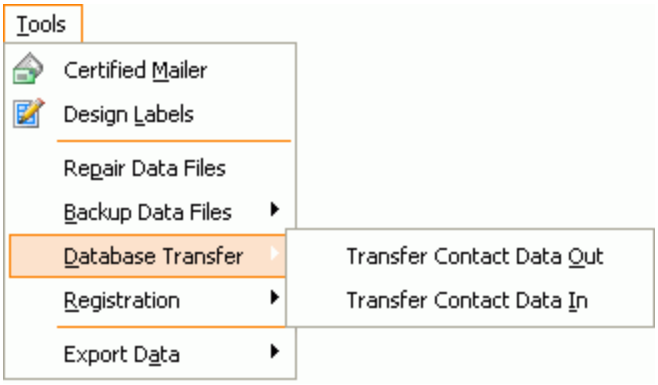



Figure 3-54, Database Transfer Menu

Selecting this option reveals two choices, **Transfer Contact Data Out** and **Transfer Contact Data In,** as shown in Figure 3-54. When you choose either option, a window appears where you select the drive and directory for each transfer in the backup files dialog window. You can transfer data out to, or in from, any file location or drive available to your computer.

After you make this selection, you can select one or more contacts whose data you wish to transfer.

## Registration Menu

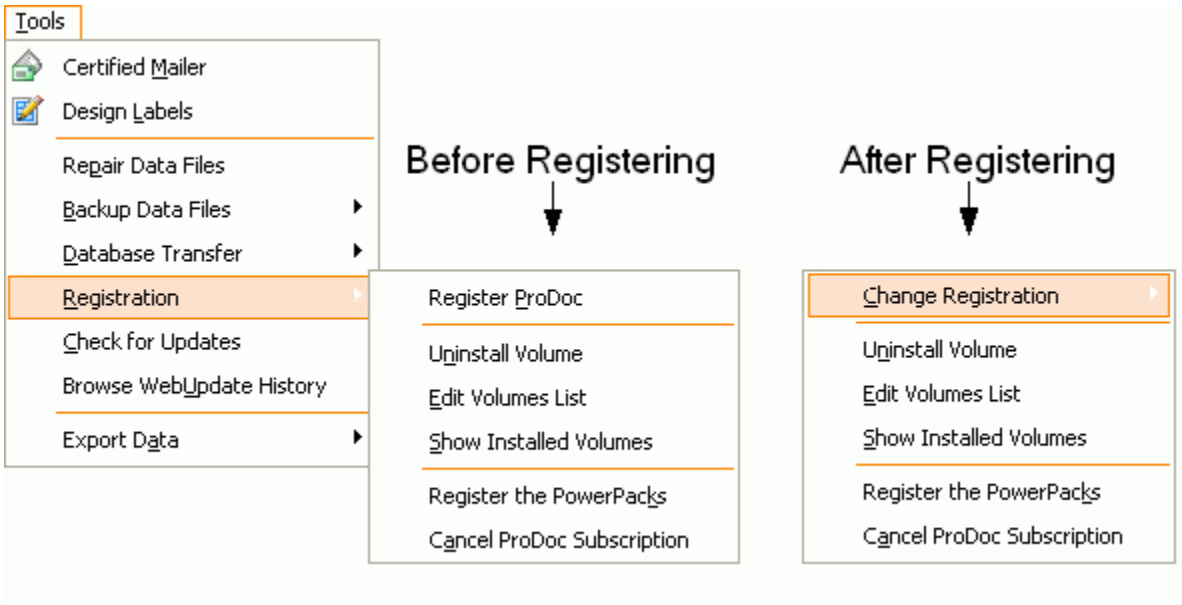



**Figure 3-55, Registration Menu and Sub-menus**

**(If available)** Figure 3-55 displays the Registration menu selection and sub-menus which let you manage all licensing and registration for ProDoc, including volumes and PowerPacks. **After ProDoc is registered, Register ProDoc is replaced by Change Registration and Change Firm Name choices as shown on the right side of Figure 3-55.**

## Register ProDoc

Normally you will only need to register the computer one time when you initially install the software. Subsequent periodic updates will automatically extend the period of your registration. Click **here** 11 to jump back to Chapter 1 and read the section on registration.

## Change Registration

You can use this option if you need to change your ProDoc license information or need to enter a new registration code. Click **Tools →Registration → Change Registration.** The **Change Registration Code** window appears. Before you change any information, please call us at 1-800-759-5418. Our Technical Support representative will help you complete the window and take any other necessary steps to change your registration.

If there is ever a problem with your registration code, this selection allows you to change your registration code or enter a new registration code, then go through the registration process again.

## Change Firm Name

**(If available)**
**To change your firm name, click Tools → Registration → Change Firm Name. This selection allows you to change your firm name and your account and contact information. There are two selections on this submenu, Change by Internet and Change by Phone. If you have an Internet connection, it's best to use the Change by Internet selection.**

- **Selecting Change by Internet brings up an internet log in screen. You will need your customer number (located on your invoice, shipping advice or billing statement) and your web password, which was provided to you after you registered. Simply log in and update your information.**
- **Selecting Change by Phone brings up a window listing details about your computer**

**and ProDoc installation and your Firm Name. You can edit your firm name in the New Firm Name field. You will then need to call us at 1-800-759-5418 to obtain and enter the Thomson Reuters Supplied Confirmation Code. Enter it and click the Change Firm Name button to make the firm name change. The technician you speak with will help you complete any other necessary actions.**

- **If you decide not to make any changes, click the Return to ProDoc button.**

## Uninstalling Volumes

The **Uninstall Volume** menu selection allows you to uninstall volumes that you no longer use. Before uninstalling a volume, please read the information that follows.

**More Information on Volume Registration.** ProDoc volumes are updated regularly to provide our customers with forms that reflect the most current laws. It is important to update ProDoc and delete your superseded volumes so you are using forms that represent the current state of the law.

ProDoc provides an expiration date for each of its volumes. It is the expiration date that helps keep attorneys and their staff up-to-date with the most current laws and forms. If you try to access ProDoc after a volume's expiration date, a window entitled Inaccessible Volumes appears, similar to Figure 3-56, warning that the volume's registration has expired and the volumes listed are no longer accessible.

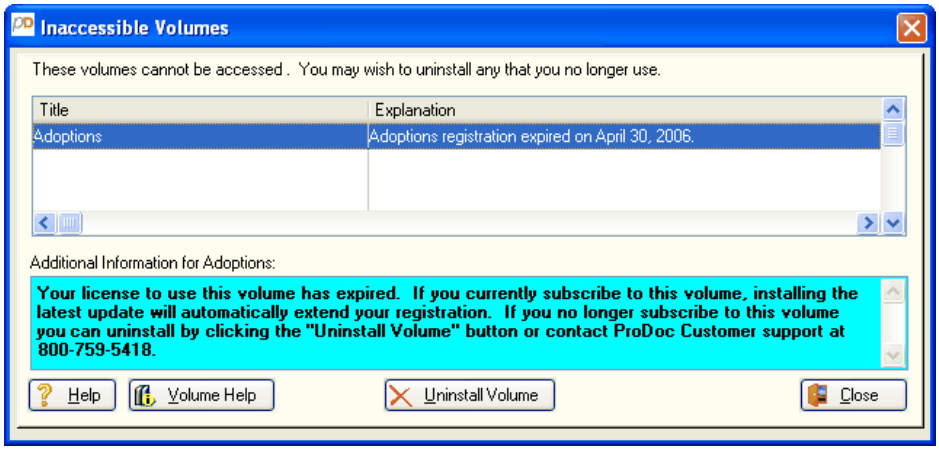

Inaccessible Volumes
These volumes cannot be accessed . You may wish to uninstall any that you no longer use.
Title
Explanation
Adoptions
Adoptions registration expired on April 30, 2006.
Additional Information for Adoptions:
Your license to use this volume has expired. If you currently subscribe to this volume, installing the latest update will automatically extend your registration. If you no longer subscribe to this volume you can uninstall by clicking the "Uninstall Volume" button or contact ProDoc Customer support at 800-759-5418.
Help
Volume Help
Uninstall Volume
Close

Figure 3-56, Inaccessible Volumes Window

In the **Inaccessible Volumes** window, the **Volume Title** and **Explanation** are displayed. **Additional Information** is provided underneath the display window. Click **Help** to view help for the **Inaccessible Volumes** window. If you want to see specific information about each volumes' authors, changes, variances and forms, click **Volume Help**. Click **Uninstall Volume** to uninstall a volume. ProDoc will display the **Volume Uninstall** message box. The message provides you with two options; **Hide Volume Only – No files are deleted** and **Permanently Delete Files and Hide Volume**. These options are discussed in detail below.

### Hide Volumes Only – No files are deleted

If you choose Hide Volumes Only – No files are deleted, the volume that you choose to hide will no longer show up on the list of volumes from which you can choose. The volume will remain on your hard drive. This allows you to move any modified master forms or supplemental forms you may have created into the new volume before deleting the prior version of the volume. If you want to continue using a volume that you have hidden, call Thomson Reuters Customer Support at 800-759-5418.

### Permanently Delete Files and Hide Volumes

If you choose Permanently Delete Files and Hide Volumes, the files will be deleted from the ProDoc directory on your hard drive and the volume will be removed from the list of volumes. If you decide later

that you want to use the expired volume, call Thomson Reuters Customer Support at 800-759-5418.

**Solutions for Expired Volumes:**

- Usually the only action you need to take is to install the latest available **WebUpdate.** If this is the case, on the main menu, click **Tools → Check for Updates** and install all new updates. The message will discontinue.
- If you have already installed all available updates, you should call Thomson Reuters Customer Support at 800-759-5418.
- If you do not install the update and the volume expires, you will need to call Customer Support and have a new registration issued for the expired volumes.
- Install the latest CD using the registration code licensed for your volumes. If you cannot locate the CD, call Thomson Reuters Customer Support at 800-759-5418.

**Ended your subscription.** If you no longer subscribe to a volume, you will not be able to access the volume and you will not receive the updated volume for that area of law.

**Solutions:**

- Call Sales at 800-759-5418 and add the expired volume to your subscription.
- Delete the unregistered volume(s).

**Supplemental Forms Use.** If you created supplemental forms in the expired volume, they will become inaccessible once the volume they were created in becomes unregistered or is deleted. You may subscribe to the volume and renew the volume's registration or move the supplemental forms into the new volume.

**Solution:** Call Customer Support at 800-759-5418 and request assistance with renewing your volume's registration or moving your supplemental forms into the new volume.

**Why keep a superseded volume?**

We are constantly updating our volumes to provide you with the most current styles and laws. Usually, the new updates affect only a portion of a particular volume. However, when substantial changes have been made in an area of law, we create a new volume to replace the outdated volume. When an outdated volume is replaced, it is superseded. If you have current cases that were created in the superseded volume, you will want to keep the superseded volume active until you have completed those cases. You should keep a superseded volume active while ongoing cases are active. This prevents the need to input the answers to questions that you have already answered once. Use the new volume for any cases you receive after installing the new volume. Once you have completed the cases that used the superseded volume, you may delete the superseded volume. You may use the new volume for your older cases, but you will have to answer all of the questions again.

You may also want to keep a superseded volume in which there are modified master forms or supplemental forms. Keeping the volume will provide you the means to move the modified master forms and supplemental forms into the new volume.

**Solution:** Call Thomson Reuters Customer Support at 800-759-5418 and request a Vlicense to extend the expiration date for the superseded volume (a Vlicense is Thomson Reuters' license for each volume).

## Edit Volumes List

This menu selection is used to add a volume or change the way a volume appears on the volume selection window. It also tells ProDoc where the volume is located. The required information includes the following:

**Title** - Title of the volume as you want it displayed on the selection window, for example, Family Law.

**Subdirectory** - Name of the directory where the volume is installed. Do not enter the full path for the directory, since ProDoc assumes the subdirectory entered here is a subdirectory directly beneath the ProDoc home directory. For example, if ProDoc is installed in the directory C:\PRODOC and if you enter FAM as the subdirectory here, ProDoc will look for the volume in C:\PRODOC\FAM. If you are adding a

volume, ProDoc will create the directory as described above.

When you select the **Edit Volume List** utility, the Volume Browse window will appear. It displays the volumes list and has **New, Change** and **Delete** buttons. To add a volume to the list, select **New**. The Volume Information window will appear, similar to Figure 3-57.

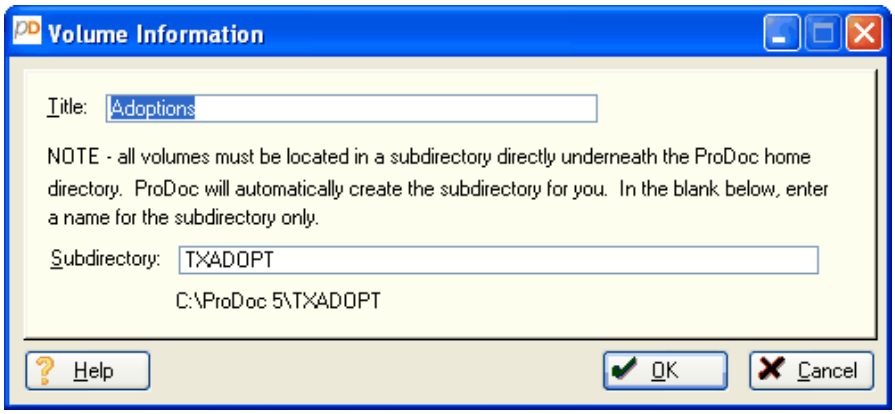

Volume Information
Title:
Adoptions
NOTE - all volumes must be located in a subdirectory directly underneath the ProDoc home directory. ProDoc will automatically create the subdirectory for you. In the blank below, enter a name for the subdirectory only.
Subdirectory:
TXADOPT
C:\ProDoc 5\TXADOPT
Help
OK
Cancel

Figure 3-57, Volume Information Window

The same window will appear if you select **Change** to change the title or subdirectory of the highlighted volume. The window contains two entry fields:

**Title** — Title of the volume as you wish it to appear in browse and selection windows, e.g. "Family Law."

**Subdirectory** — Subdirectory where volume files are stored. This must be a subdirectory under the main ProDoc directory (normally C:\PRODOC). If you enter an incorrect subdirectory, ProDoc will not be able to find the volume files and you will not be able to access the volume until this subdirectory is changed to the subdirectory where the volume files are stored.

To delete a volume from the volumes list, highlight the volume desired and click the **Delete** button. You will be prompted to confirm the deletion, and the volume will be removed from the list. You will no longer be able to access the deleted volume even though deleting the volume from the volumes list doesn't delete any volume files. WARNING – if you delete a ProDoc volume from the list and later want to add it back, you should install the volume rather than merely adding it back to the volumes list.

## Show Installed Volumes

Selecting **Show Installed Volumes** displays a browse list of all of the volumes you have installed. You may need to refer to this list while getting help from technical support. You can click the **Info** button to see a listing of the current changes from the last update, any variances, the authors of the forms, and a list of forms for each volume.

## Register the PowerPacks

This menu option will only be available to those customers who subscribe to the PowerPacks—Additional Timesavers.

If your PowerPack registration expires while your subscription is current, you should call Technical Support at (800) 759-5418. The technician that you speak with will take you through a number of steps that must be completed before you can re-register the PowerPack.

To register a PowerPack:

1. Call Thomson Reuters Technical Support at (800) 759-5418.
2. On the ProDoc toolbar click **Tools → Registration → Register the PowerPacks**.

3. The **Registration Information for PowerPack** window appears.
4. Give the support technician the **Validation seed** that appears in the upper left side of the **Registration Information for PowerPack** window.
5. Make sure that **Today's date** is correct.
6. The technician will tell you the **Registration type**, **Expiration date**, **Validation Code** and which **PowerPack(s)** to choose. To choose a **PowerPack**:
   a. In the **PowerPack** section of the **Registration information for PowerPack** window highlight the PowerPack you are registering by clicking on it. If only one PowerPack is displayed in the PowerPack section it is always highlighted.
   b. Click to the left of the highlighted PowerPack and a green check mark appears. You may also click the **Select** button to place a green check mark next to the highlighted PowerPack.
   c. If you need to register all listed PowerPacks, click the **Select All** button to select all the PowerPacks in the list. Click the **Clear All** button to clear all selections.
7. Click **OK.** This button is disabled if no PowerPacks are selected.

To permanently un-register one or more installed PowerPacks, select the desired PowerPacks and click the **Permanently Unregister PowerPack** button. This button is disabled if no PowerPacks are selected. Click **Yes** when the **Unregister the PowerPack** window appears and the selected PowerPack (s) will be permanently unregistered.

To take no action, click the **Cancel** button to close the window.

## Check for Updates

To run **WebUpdate,** click **Tools → Check for Updates.** The program will check Thomson Reuters' online server for updates needed for your installation. If updates are available, the **Updates for ProDoc are now available** window appears. You have three choices on this window:

- Click **Download and Apply All Updates** to download all updates. The updates will be downloaded, and a window will be displayed which tells you the updates have been downloaded. You will be prompted to restart ProDoc to install the updates. After ProDoc restarts, the downloaded updates will be installed.
- Click **Select Updates to Download and Apply** to open a window displaying available updates and a description of each update available. The selection box for each update will be checked. We recommend you download each available update. If you want to exclude an update from download, click the update's check box to clear it, and the update will not be downloaded. Click **Begin Download** to download the selected updates. If you don't want to download updates at this time, click **Cancel.**
- Click **Do Not Download Updates at this Time** to close the update window without downloading any updates.

## ProDoc WebUpdate Window

This window displays available updates and a description of each update available. The selection box for each update will be checked. We recommend you download each available update. If you want to exclude an update from download, click the update's check box to clear it, and the update will not be downloaded. Click **Begin Download** to download the selected updates. If you don't want to download updates at this time, click **Cancel**.

## Browse WebUpdate History

To check your update history, Click **Tools → Browse WebUpdate History**. The **Browse WebUpdate History** window will appear. This window displays a history of all updates you've downloaded. If you want to see updates that you have **not** downloaded, uncheck the box labeled **Display only downloaded updates**. Click **Close** to close the window.

## Cancel ProDoc Subscription

This menu choice provides you the means to notify us that you wish to cancel your subscription. The window that appears provides us with the information needed to complete your request. It also provides fields where you can tell us your reasons for cancelling and any suggestions you may have for us. We value your feedback, and this information will help us improve the services we provide. When completed, this window generates an email which is sent to us so we can process your request.

## Export Data Menu

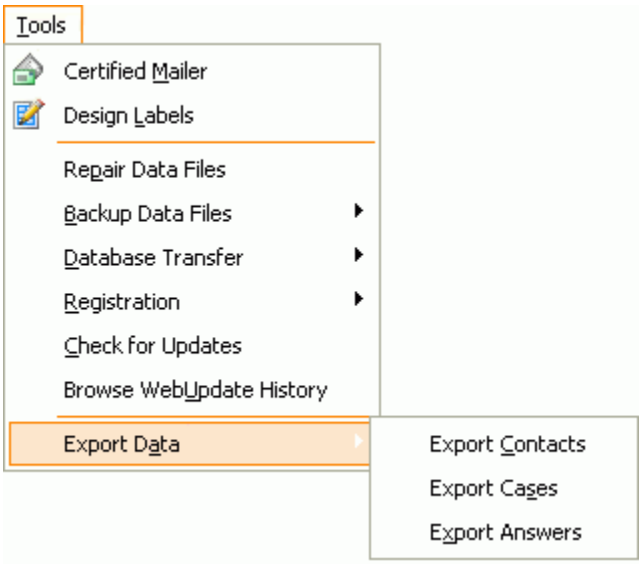



Figure 3-58, Export Menu Choices

The Export Data menu choices are shown in Figure 3-58.

You can use this menu selection to export contact information, case information, and answers.

The data is exported to a comma-delimited ASCII file.

To export data from the three categories, you first select the appropriate contacts or cases, then you must select the fields you wish to export. Selecting **Export Contacts** brings up the **Select Contacts** window, while selecting **Export Cases** and **Export Answers** brings up the **Select Cases** window. Figures 3-59 and 3-60 depict these windows. The basic process for selecting the contact or case is the same for exporting contacts or exporting cases.

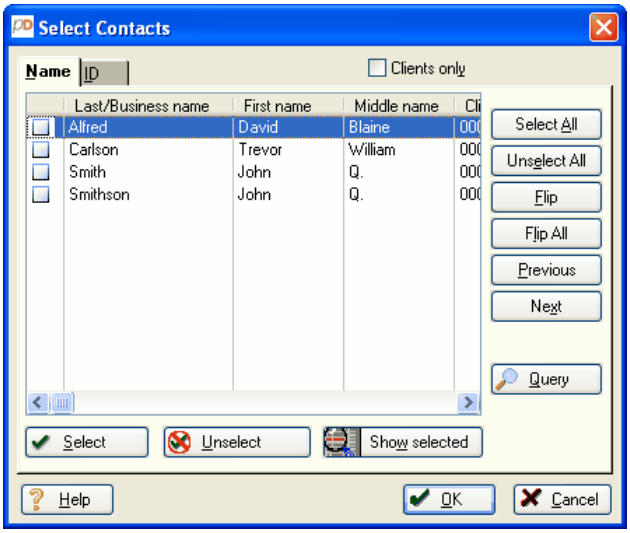
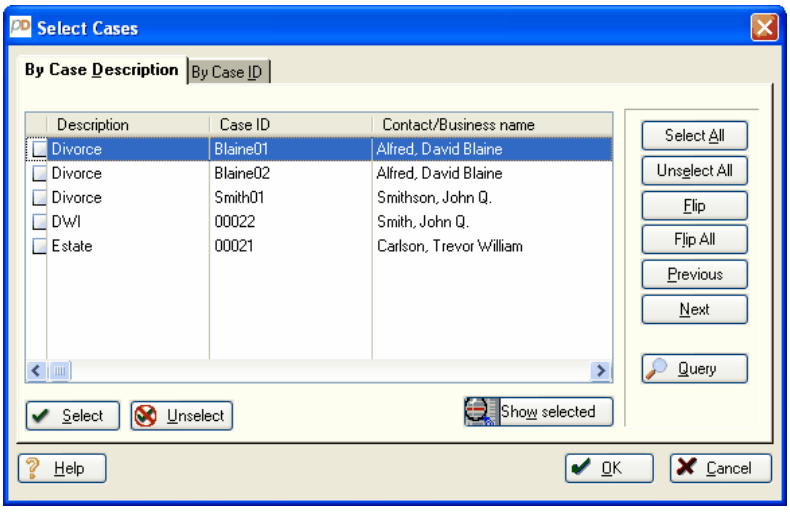



Figure 3-59, Select Contacts Window

When selecting contacts for export, you can display your list by **Name** or by **ID**. If desired, you can click the **Clients Only** box to only display clients.

Use the buttons at the bottom of the window to select or unselect individual contacts and view only those you've selected.

Use the buttons on the right side of the window to quickly change your selections, flip one or all selections, search the database for a particular contact, move the highlight to the previous or next one selected, or perform a query to find those who match selected search criteria.




When selecting cases or case answers for export, you can display your list by **Case Description** or by **Case ID**.

The selections buttons and controls on this window operate in the same manner as those on the Select Clients window.

Figure 3-60, Select Cases Window

After you select the clients or cases as appropriate and click the **OK** button, the Choose Field for Export window appears, similar to Figure 3-61.

Figure 3-61, Choose Fields for Export Window

A list of controls for this window follows:

**Add -** Highlighting any of the fields that are displayed on the left side of the Choose Fields for Export box and clicking **Add** will place the highlighted field in the Export Fields display on the right side of the box.

**Remove -** Highlighting any of the fields that are displayed on the right side of the Choose Fields for Export box and clicking **Remove** will remove the highlighted field in the Export Fields display.

**Shift Up -** Moves the highlighted field up in the list of fields to export.

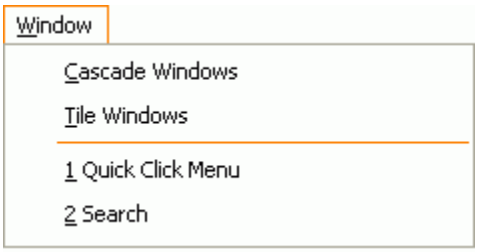
**Shift Down -** Moves the highlighted field down in the list of fields to export.

**Picture -** Allows you to set the format in which your numbers are exported. Example: @n6.2 means that the numbers that you export will be exported as six numbers, a decimal point and two numbers following the decimal point.

When you are finished choosing fields, click the **OK** button. A browse/save directory window will appear,

where you will enter the file name and locate the folder in which to save the file.

## Window Menu




The **Window** menu, depicted in Figure 3-62, shows you what windows you currently have opened and allows you to display the windows in different ways on the screen. You can also use the numbered list of open windows to choose which one to work with.

Figure 3-62, Window Menu Choices

## Help Menu

The **Help** Menu displays options for getting help. The menu is depicted in Figure 3-63.

Figure 3-63, Help Menu

**Context Sensitive** allows you to get help on the particular task you're working on.

**Contents** displays the Help library.

**Search for Help on**... allows you to use search for and find help topics.

**How to use Help** explains the help system used in ProDoc.

**About ProDoc** lists version, license and subscription information.

**About the Volumes** lets you access the list of the latest updates installed. This information includes a description of the current changes from the last update, any variances, the authors of the forms, and a list of forms for each volume.

**Visit ProDoc Website** opens the ProDoc Web site in a browser window.

**Send an Email to ProDoc** opens an Outlook message addressed to ProDoc. This message will automatically contain version, installation and firm information. This information will help Thomson Reuters' Customer Service technicians handle your issue efficiently.

# Introduction to Florida PowerPacks

## What are PowerPacks?

PowerPacks are collections of powerful tools that allow fast and efficient entry of information for document assembly and information management. Using PowerPack programs significantly reduces the amount of time it takes to assemble documents. The following PowerPacks are currently available for subscription in Florida:

**Florida Family Law PowerPack.** This PowerPack features the following programs:

- **Child Support Guidelines** 91 - Calculates child support obligations and delinquent balances. This program includes the **Child Support Guidelines** 91, **Payment Splitter** 99, and the **Obligation Amortizer** 96.
- **Delinquency Calculator** 101 - Calculates delinquent amounts based on child support, alimony and previously entered judgments, and the payments that have been made.
- **UCCJEA Affidavit** 109 - Allows you to enter the five year residential history of each child involved in the selected case, enter additional information regarding ancillary matters which affect the children and list all third-parties claiming visitation and/or custody rights to the children.
- **Financial Affidavit (>= $50,000)** 119 - Prepares a financial affidavit for a client who earns $50,000 or more annually.
- **Financial Affidavit (< $50,000)** 144 - Prepares a financial affidavit for a client who earns less than $50,000 annually.
- **Equitable Distribution System (>=$50,000)** 132 - Inventories and assigns property for dissolutions where a client earns $50,000 or more annually.
- **Equitable Distribution System (<$50,000)** 132 - Inventories and assigns property for dissolutions where a client earns less than $50,000 annually.
- **Tax Calculator** 157 - Calculates federal income, FICA, Medicare and self-employment taxes.

**Florida Probate PowerPack.** This PowerPack features the following programs:

- **Probate Inventory** 164 – Prepares an estate inventory and performs calculations automatically.
- **Probate Accounting** 170 – Prepares an estate accounting and performs calculations automatically.
- **Probate Management System** 178 – Stores information pertaining to your client's probate matter in one convenient location and provides the information to the questions and documents that require it.

## How Can I Locate the PowerPacks?

On the ProDoc menubar, click **PowerPacks**.

- If you subscribe to the Florida Family Law Volume and PowerPack, you should see the **Family Law** menu choice. Click **Family Law** to display the program choices.
- If you subscribe to the Florida Probate Volume and PowerPack, you should see the **Probate** menu choice. Click **Probate** to display the program choices.

## How Do I Get the PowerPacks If I Don't Already Subscribe?

If your subscription does not currently include a PowerPack you need, call ProDoc Sales at 800-759-5418 to add it to your subscription. Get the power today!

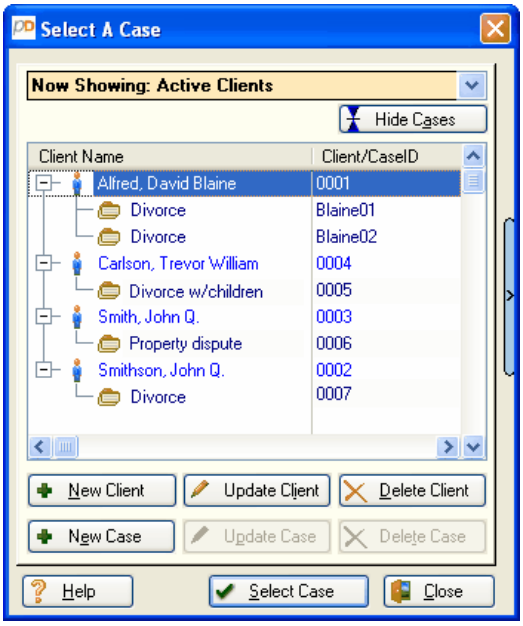
## How Do I Use PowerPack Tools?

If you would like further instructions on using PowerPacks, consult this manual, click the **Help** buttons that appear in the PowerPack program you are using or call Technical Support at 800-759-5418. Support included at no extra charge includes:

- **Help** buttons on each window (or press the **F1** key).
- Computer Based Training (CBT) Modules at the **ProDoc Web site.**
- Periodic ProDoc user seminars; schedule these through the **ProDoc Web site.**
- Call our Technical Support specialists at 1-800-759-5418.
- Send email to **tech@prodoc.com.**

# Selecting a Case for PowerPack Use

This section discusses selecting an **existing** client and case. If you need to create a **new** client and case, click the **New Client** button to create the client. After creating the client, highlight the new client's name and click the **New Case** button to create a new case for the client. For help, click the **Help** buttons on the windows used or click **here** 33 to see the section on adding new clients.




Select a Case Window

Use the **Select a Case** window to choose a client and case file in which to save the information you input into your PowerPack program. It lists existing ProDoc clients and all cases for the clients. You can also use it to see and modify related client/case data and create new clients and cases.

You can select a case to use by either of the methods listed below:

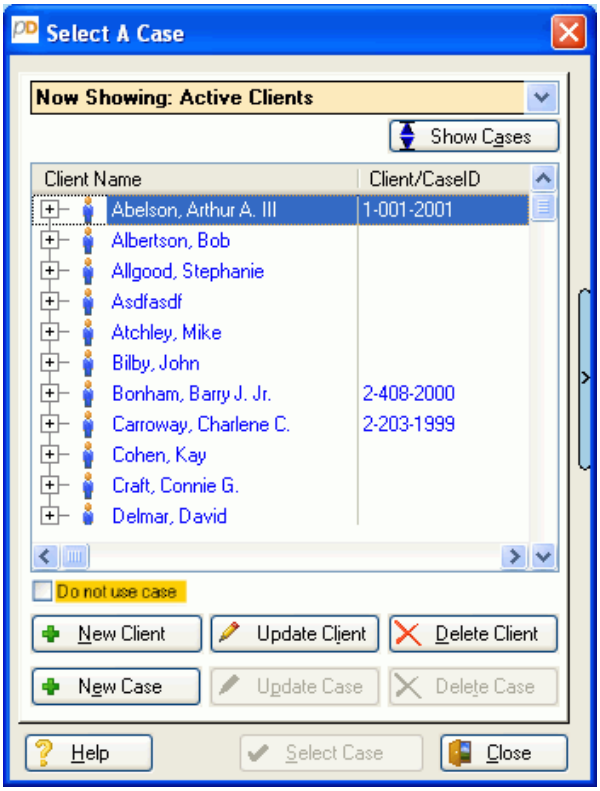
- Double-click a displayed case.
- Click a displayed case, then press the **Enter** key or click the **Select Case** button.

**To find a case that's not displayed:**

- Type the first letter(s) of a client's name to jump to that client's entry on the tree. To do this more than once, use the backspace key to clear your previous letter entries.
- Use the scroll bar on the right of the form to quickly scroll through the list. You can also click on any entry on the left and scroll with keyboard page up, page down, and up/down arrow keys.
- Use the **Now Showing:** drop down arrow to choose the types of contacts or clients to display. Cases are grouped under clients, who are grouped in alphabetical order. Categories will be displayed with type icons of different colors on the window. The default is **Active Clients.** Other choices are **All Contacts, Closed Contacts, Private Clients** and **Non-Clients.**
- Use the **Hide/Show Cases** toggle button to display or hide cases. Likewise, you can click the ⊞ or ⊟ symbols in the client tree to reveal or hide cases.

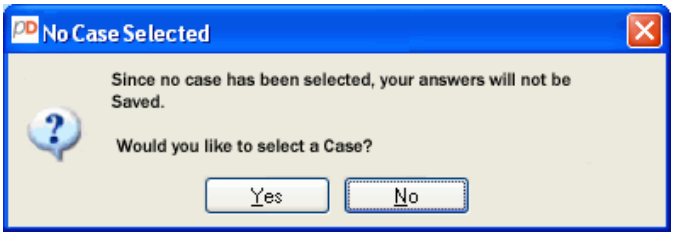
**For Florida and Texas PowerPack Users Only**

Some PowerPack programs may be used without selecting a case. When you run these programs, the **Select a Case** window will display a **Do not use case** check box just above the **New Client** button. If you check this box, the **Select Case** button title changes to **OK**. Click **OK** to open the program with no case selected.




Select a Case Window With a Do Not Use Case Option

If you check the **Do not use case** box, no client information will be saved, and the following popup message appears:




No Case Selected Notice

Select **Yes** to select a case for the client, or lose your information by selecting **No**.

# Child Support Guidelines

This program allows you to:

- Automatically calculate the total **Basic Monthly Obligation** for child support, and each parent's respective monthly share of the obligation.
- Access the **Tax Calculator** to determine the party's monthly net income automatically. The **Tax Calculator** is used for single tax filers and cannot be used for married couples.
- Utilize this option in conjunction with a specific client and case file, in order to save the answers and use them later for other documents in the same case.
- Generate and print a **Child Support Guidelines Worksheet** and the **Certificate of Service** with a click of the mouse.

After you enter the required information, the total **Basic Monthly Obligation** (based on the chart from the Florida Family Law Rules of Procedure) for each parent, as well as each parent's **Minimum Child Support Obligation** will be calculated and displayed automatically.

You may access the **Tax Calculator** from the Child Support Guidelines **Monthly Net Income** form. The **Tax Calculator** allows you to automatically calculate the spouses' monthly net income.

## Opening the Child Support Guidelines Program

To open the **Child Support Guidelines** calculator:

1. Click **PowerPacks → Family Law → Child Support Guidelines.**
2. The **Select a Case** window appears. To find the client you want to use:
   a. Type the first few letters of the client's last name. As you type, the highlight will move to the next match on the client list. To start over, press the **Backspace** key on your keyboard.
   b. You can also use the scroll bar at the right side of the window to scroll through the alphabetical list.
3. When the selected client is highlighted, you can double-click the name, press the right arrow key on your keyboard, or click the **Show Cases** button to view the client's cases.
4. Select a case by double-clicking a case title. You can also click the title once, then press the **Enter** key or click the **Select Case** button.
5. The **Child Support Calculator** program opens to the **General Information** form.

# Child Support Guidelines Forms

The **Child Support Guidelines** program is made up of three forms, shown as tabs. They are the **General Information, Monthly Net Income** and **Calculator** forms.

The **General Information** form allows you to enter the parents' information along with the court information regarding this case. The **Monthly Net Income** form lets you calculate or enter the father and/or mother's filing status and monthly net income. The **Calculator** form is where you enter a party's financial information and costs related to the children. If you have already used the **Tax Calculator** to calculate the parties' net income in one of the Financial Affidavit programs, these figures will already be entered and the field will not be accessible. There is a section on the **Calculator** form to enable the rule relating to overnight stays with parents. To enable the overnight rule, place a check in the **Use the rule of 40% overnights to calculate the obligation** box.

# General Information Form

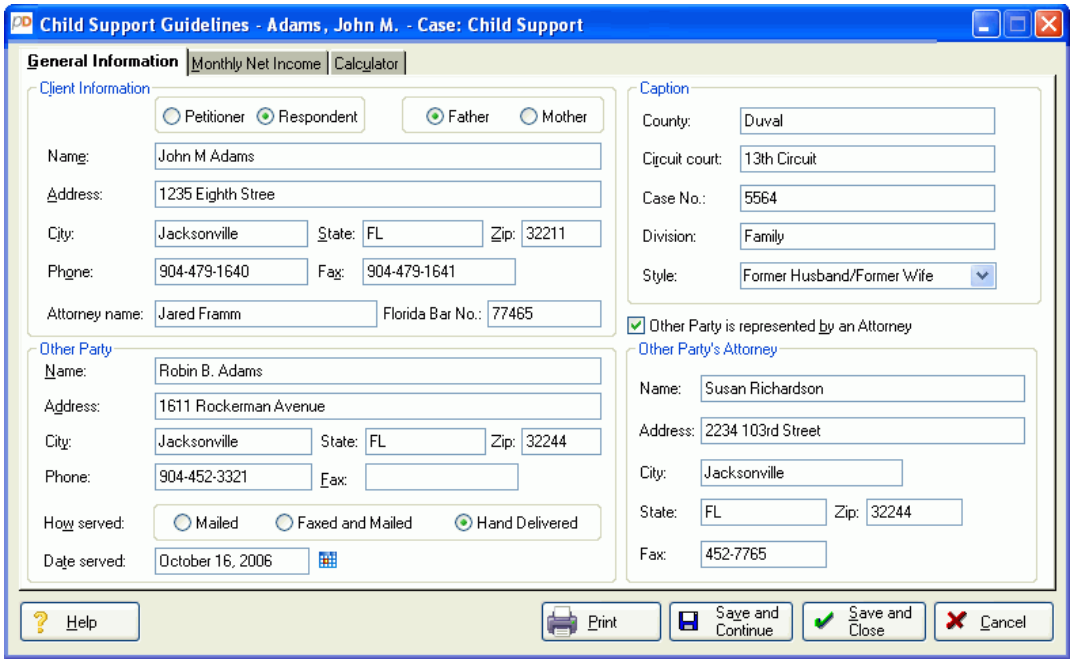



Figure 1, Child Support Calculator General Information Form

If you selected a specific client and case, any answers that have been stored in the case file will appear in the pertinent fields on the **General Information** form.

The information that you need to enter on the **General Information** form follows:

1. **Client Information** section
   a. Indicate the status of your client as **Petitioner** or **Respondent,** and as **Father** or **Mother.**
   b. Enter the party's name, mailing address, phone and fax number.
   c. Enter the client's **Attorney name** and **Florida Bar Number.**
2. **Other Party** section
   a. Enter the other party's name, mailing address, phone and fax number.
   b. **How served** – Click the **Mailed, Faxed and Mailed** or **Hand Delivered** radio button to indicate the method of service used.
   c. **Date served** – Enter the appropriate date for service on the other party, or click the calendar icon to select a date to be entered automatically.
3. **Caption** section – Enter the **County, Circuit court, Case number and Division.** Use the drop-down arrow to choose the **Style**.
4. **Other Party is represented by an Attorney** box – Check this box if an Attorney represents the other party.
5. **Other Party's Attorney** section – enter the Attorney's name, mailing address and fax number.

**Note:** If you are using a case file and have entered information for the opposing counsel, it will appear in the certificate of service. Otherwise, the other party's information will show up in the certificate of service.

# Monthly Net Income Form

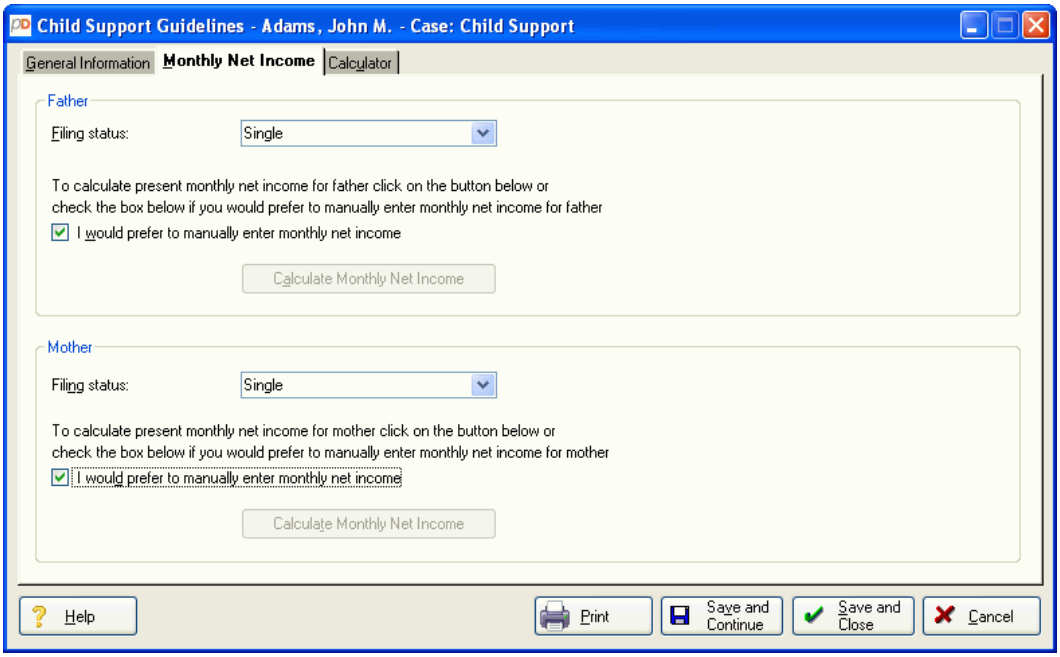

Child Support Guidelines - Adams, John M. - Case: Child Support
General Information
Monthly Net Income
Calculator
Father
Filing status:
Single
To calculate present monthly net income for father click on the button below or
check the box below if you would prefer to manually enter monthly net income for father
I would prefer to manually enter monthly net income
Calculate Monthly Net Income
Mother
Filing status:
Single
To calculate present monthly net income for mother click on the button below or
check the box below if you would prefer to manually enter monthly net income for mother
I would prefer to manually enter monthly net income
Calculate Monthly Net Income
Help
Print
Save and Continue
Save and Close
Cancel

Figure 2, Monthly Net Income Form

You may choose the spouses' filing status and whether you want to calculate each spouse's monthly net income or manually enter their monthly net income on this screen.

To choose the spouse's filing status:

1. Click the drop-down arrow to the right of the **Filing status** field in the **Father** and/or **Mother's** section.
2. Choose **Head of Household, Single, Surviving Spouse, Married Filing Jointly** or **Married Filing Separately** from the drop-down list that appears.
   a. If you choose **Head of Household, Single** or **Surviving Spouse**, you may use the **Tax Calculator** to determine the spouses' net monthly income.
   b. If you choose **Married Filing Jointly** or **Married Filing Separately,** you cannot use the **Tax Calculator** and must determine the spouses' monthly net income manually.
3. Click the **Calculate Monthly Net Income** button if you want to automatically calculate the monthly net income using the **Tax Calculator.**
   a. The monthly net income is calculated from the information you provide in the **Tax Calculator** program.
   b. You can print a Tax Summary worksheet by clicking **Print** while in the **Tax Calculator**.
   c. The Child Support Guideline and the Financial Affidavit programs share the calculations made in the **Tax Calculator.**
4. If you have already calculated the monthly net income for either spouse and want to enter it manually, place a check in the **I would prefer to manually enter monthly net income** checkbox.

# Calculator Form

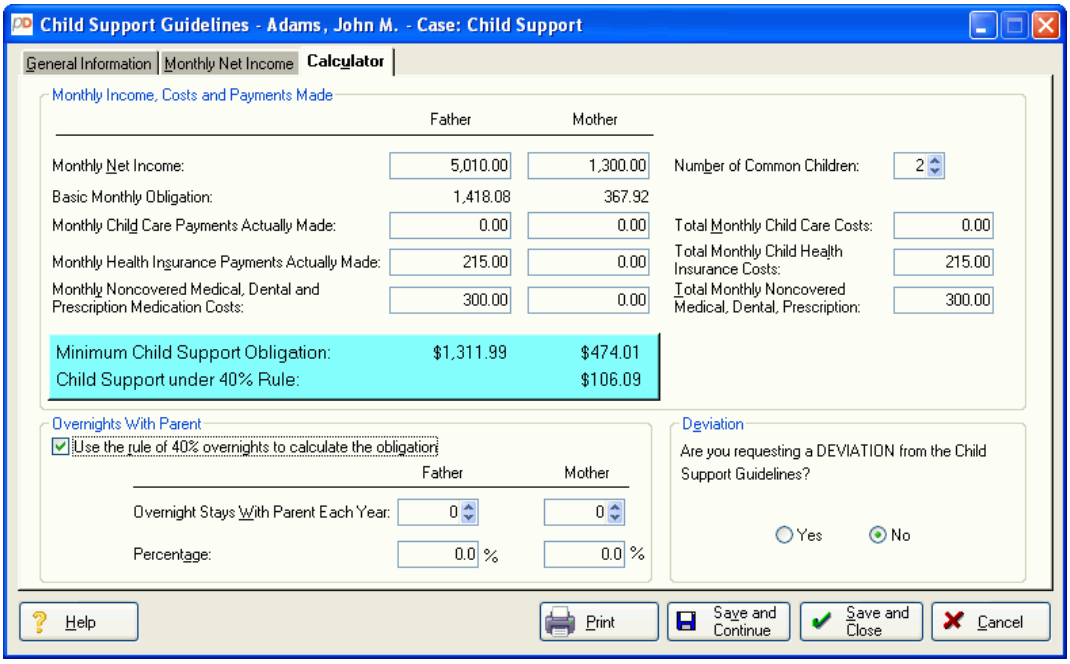



Figure 3, Calculator Form

To calculate the **Monthly Obligation,** follow the steps below:

1. **Father** and **Mother's Monthly Net Income.** The **Basic Monthly Obligation** is automatically calculated from the monthly net income amounts you enter.
   a. If you have already used the **Tax Calculator** to calculate either party's net income, their net income will display in the field and will not be accessible from this form.
   b. If you chose to calculate either or both parties' income manually on the **Monthly Net Income** form, the appropriate fields will appear for you to complete.
2. Use the field arrows to select the appropriate **Number of Common Children**.
3. Enter the total **Monthly Child Care Payments Actually Made** (if any) by each spouse. The **Total Monthly Child Care Costs** are automatically calculated from these amounts.
4. Enter the total **Monthly Health Insurance Payments Actually Made** (if any) by each spouse. The **Total Monthly Child Health Insurance Costs** are automatically calculated from these amounts.
5. Enter the total **Monthly Noncovered Medical, Dental and Prescription Medication Costs** paid by each spouse. The **Total Monthly Noncovered Medical, Dental and Prescription** costs are automatically calculated from these amounts.
6. If you are using the rule of 40% overnights to calculate the obligation, click the box. Use the field arrows to enter the number of overnight stays each year for each spouse. The **Percentage** field amounts will automatically update as you change the number of stays. The **Child Support under 40% Rule** is automatically calculated from this information.
7. Click the appropriate radio button in the **Deviation** section to indicate whether you are requesting a deviation from the Child Support Guidelines.

**Note:** The **Minimum Child Support Obligation** is automatically calculated after you complete the monthly net income amounts and as you complete the monthly child care, child health insurance and noncovered medical, dental and prescription costs.

## Printing the Child Support Guidelines Worksheet

To print the worksheet:

1. Click the **Print** button. The worksheet is printed as a graphic form.
2. The **Preview** window appears.
   a. Click **Yes** to preview the report.
   b. Click **No** if you wish to print the report without previewing it.

## Toolbar

**Help** – Click this button to bring up the help window.

**Print** – Click this button to print the **Child Support Guidelines Worksheet.**

**Save and Continue** – Click this button to save your work and continue using the program.

**Save and Close** – Click this button to save your work and exit the program.

**Cancel** – Exits the program without saving any entered or calculated information.

# Obligation Amortizer

The **Obligation Amortizer** allows you to determine the amount of time it will take to pay an obligation on which simple interest is accruing.

You will also have the option to print an **Amortization Schedule** that sets out a detailed, comprehensive schedule of payments from beginning date to ending date. For each payment, the schedule will show the respective amounts allocated to interest and to principal, along with the principal remaining balance. A page with a summary of the pertinent data will also be generated.

### Opening the Obligation Amortizer

On the ProDoc toolbar, click **PowerPacks → Family Law → Obligation Amortizer.** The **Obligation Amortizer** window appears.

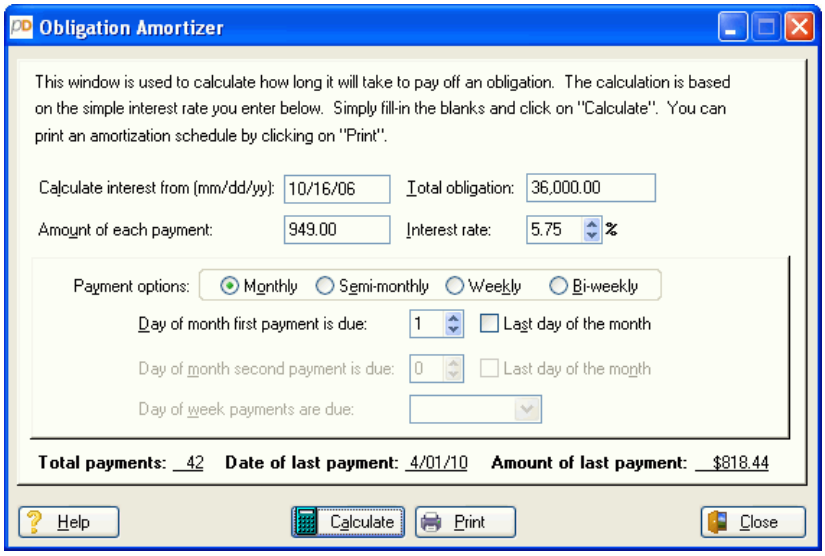

Obligation Amortizer
This window is used to calculate how long it will take to pay off an obligation. The calculation is based on the simple interest rate you enter below. Simply fill-in the blanks and click on "Calculate". You can print an amortization schedule by clicking on "Print".
Calculate interest from (mm/dd/yy): 10/16/06
Total obligation: 36,000.00
Amount of each payment: 949.00
Interest rate: 5.75 %
Payment options: Monthly Semi-monthly Weekly Bi-weekly
Day of month first payment is due: 1
Last day of the month
Day of month second payment is due: 0
Last day of the month
Day of week payments are due:
Total payments: 42 Date of last payment: 4/01/10 Amount of last payment: $818.44
Help
Calculate
Print
Close

Figure 4, Obligation Amortizer Window

## Amortizing the Obligation

To **Amortize the Obligation,** you only need the following information:

- Beginning date for calculating interest
- Total obligation (principal amount)
- Amount of each payment
- Interest rate
- Frequency of payment (monthly, semi-monthly, weekly, or biweekly)

Enter this information in the appropriate fields. You can move to the next field by using the **TAB** button or by pointing and clicking the mouse.

### Frequency of Payment

- If you select **Monthly** (once a month) in **Payment Options,** then you will enter the day of the month the first payment (and each payment thereafter) is due.
- If you select **Semi-monthly** (twice a month), then you will enter the day of the month the first payment and the second payment is due.

- If you select **Weekly** (once a week), then you will select the day of the week each payment is due.
- If you select **Bi-weekly** (once every two weeks), then you will select the day of the week each bi-weekly payment is due.

**Note:** The **Total Payments,** the **Date of Last Payment,** and the **Amount of Last Payment** will be calculated and displayed automatically.

**Calculate** – Click this button and the following calculations will be inserted in the **Amortization Schedule** for **each payment and date:**

- The amount of the payment applied to interest,
- The amount of the payment applied to principal, and
- The resulting principal balance after the payment has been applied.

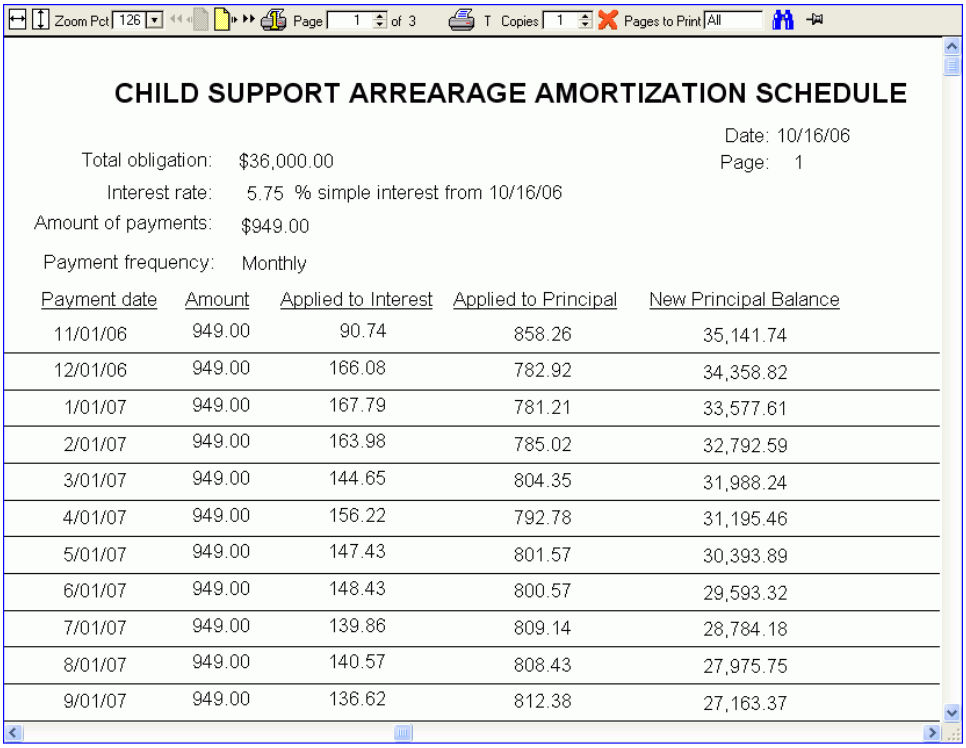
## Printing the Amortization Schedule

**Print** – Click this button to print the Amortization Schedule, which will be printed as a graphic form.

**Preview** – If you want to preview the Schedule before you print, click **Yes** on the **Print Preview** window. If you wish to **print immediately without previewing**, click **No.** While in the "Report Preview" window, you will have the option to do the following:

**Customize viewing options** – from the buttons on the menu bar, you can choose **Full Width View** or **Full Height View,** change the Zoom percentage, or move from page to page.

**Select printing options** – you can print only the page being displayed, convert the files to an ASCII-DOS text file, print the entire document, or print multiple copies.




| Payment date | Amount | Applied to Interest | Applied to Principal | New Principal Balance |
|---|---|---|---|---|
| 11/01/06 | 949.00 | 90.74 | 858.26 | 35,141.74 |
| 12/01/06 | 949.00 | 166.08 | 782.92 | 34,358.82 |
| 1/01/07 | 949.00 | 167.79 | 781.21 | 33,577.61 |
| 2/01/07 | 949.00 | 163.98 | 785.02 | 32,792.59 |
| 3/01/07 | 949.00 | 144.65 | 804.35 | 31,988.24 |
| 4/01/07 | 949.00 | 156.22 | 792.78 | 31,195.46 |
| 5/01/07 | 949.00 | 147.43 | 801.57 | 30,393.89 |
| 6/01/07 | 949.00 | 148.43 | 800.57 | 29,593.32 |
| 7/01/07 | 949.00 | 139.86 | 809.14 | 28,784.18 |
| 8/01/07 | 949.00 | 140.57 | 808.43 | 27,975.75 |
| 9/01/07 | 949.00 | 136.62 | 812.38 | 27,163.37 |

Figure 5, Preview of Amortization Schedule Report

A summary page showing the total amount paid and the total amount allocated to interest is also generated.

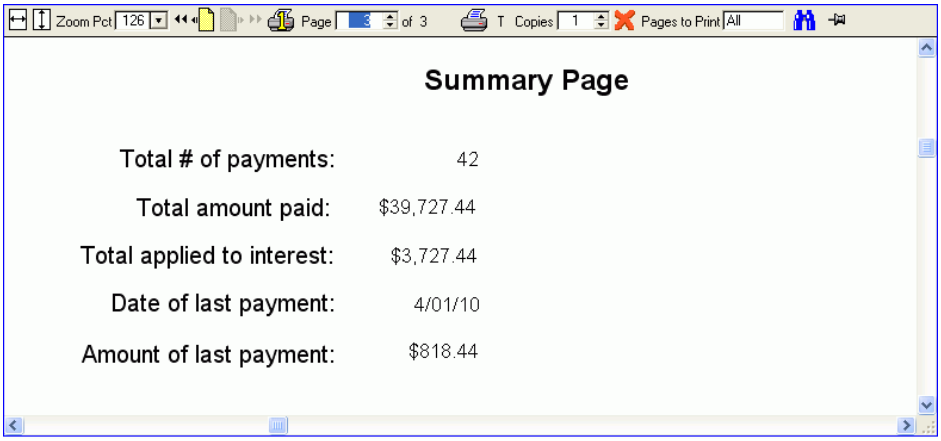



Figure 6, Preview of Summary Page

## Exiting

**Close** – To exit the **Obligation Amortizer** session, click this button.

# Payment Splitter

This program uses a monthly payment as a baseline to calculate amounts due in increments of less than one month, i.e., semi-monthly (twice a month), weekly, and biweekly (once every two weeks). This is handy to compute the amount that should be withheld from the paycheck of a child support obligor for each pay period.

You will also be able to **Print** the results.

### Opening the Payment Splitter

On the ProDoc toolbar, click **PowerPacks → Family Law → Payment Splitter (Semi-Monthly, Weekly, Biweekly).**

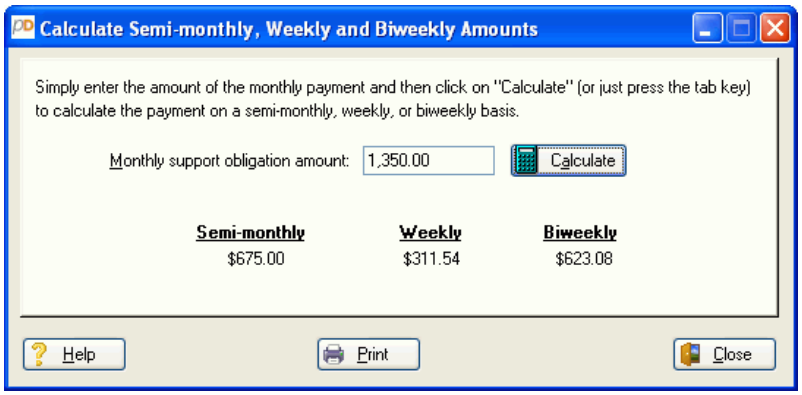



Figure 7, Payment Splitter Window

### Calculating the Amounts

To **Calculate the amounts** – Enter the monthly payment amount and click **Calculate** or press the **TAB** key.

> **Note:** The payment amounts that are due for **Semi-monthly, Weekly,** and **Biweekly basis** are calculated and displayed automatically.

### Printing the Results

**Print** – Click this button to print the amount on a semi-monthly, weekly, and biweekly basis.

**Preview** – If you want to preview the report before you print, click **Yes.** If you wish **to print immediately without previewing,** click **No**. While in the "Report Preview" window, you will have the option to do the following:

**Customize viewing options** – from the buttons on the menu bar, you can choose Full Width View or Full Height View, change the Zoom percentage, or move from page to page.

**Select printing options** – you can print only the page being displayed, convert the files to an ASCII-DOS text file, print the entire document, or print multiple copies.

Figure 8, Report Preview Window

## Exiting

**Close** – To exit the **Payment Splitter,** click the **Close** button.

# Delinquency Calculator

The **Delinquency Calculator** allows you to:

- Record child support and alimony obligations.
- Record payments towards obligations.
- Set payment allocation priorities.
- Enter the date judgment was rendered and the obligations for the judgment and attorney's fees.
- Set contractual interest rates (if applicable).
- Set grace periods (for contractual interest only).
- Print delinquent obligation reports.

The **Delinquency Calculator** is used to record child support, alimony and judgment obligations, as well as payments made towards the obligations. If statutory interest rates aren't applied to the obligations, contractual interest rates and grace periods can be set for the payments due.

The **Delinquency Calculator** also allows you to print a **Summary** or a **Delinquent Obligation Report.** The **Summary** prints on a single page and displays the total of all obligations and payments, as well as the remaining balance of principal and interest due. The **Delinquent Obligation Report** prints a description of interest rates and how they may be applied, a list that shows the order in which payments are applied to items, the summary page, an audit report that shows how much of each payment was applied to the various obligations and interest due on those obligations, and a listing of all payments and obligations entered for a case.

To use the **Delinquency Calculator:**

1. On ProDoc's main menu, click **PowerPacks → Family Law → Delinquency Calculator.**
2. The **Select a Case** window appears. To find the client you want to use:
   a. Type the first few letters of the client's last name. As you type, the highlight will move to the next match on the client list. To start over, press the **Backspace** key on your keyboard.
   b. You can also use the scroll bar at the right side of the window to scroll through the alphabetical list.
3. When the selected client is highlighted, you can double-click the name, press the right arrow key on your keyboard, or click the **Show Cases** button to view the client's cases.
4. Select a case by double-clicking a case title. You can also click the title once, then press the **Enter** key or click the **Select Case** button.
5. The **Delinquency Calculator** program opens to the **General** form. Fill in the information on each form.
6. After you provide the necessary information, you may print out a report that shows payments made and how much support is currently owed.

## Delinquency Calculator Toolbar

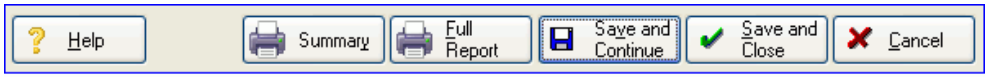



Figure 1, Toolbar

**Help -** Click for help on the screen you are viewing.

**Summary -** Click to print a report that shows the total of all obligations and payments, as well as the remaining balance of principal and interest due. When this report is printed, information that has been entered for the selected case is saved.

**Full Report -** Click to print a description of interest rates and how they may be applied, a list that shows the order in which payments were applied to items, the summary page, an audit report that shows how much of each payment was applied to the various obligations and interest due on those obligations, and a listing of all payments and obligations entered for a case. When this report is printed, information that has been entered for the selected case is saved.

**Save and Continue -** Click to save your work and continue using the **Delinquency Calculator.**

**Save and Close -** Click to save your work before closing the **Delinquency Calculator.**

**Cancel -** Click to close the **Delinquency Calculator** without saving your work.

## General Form

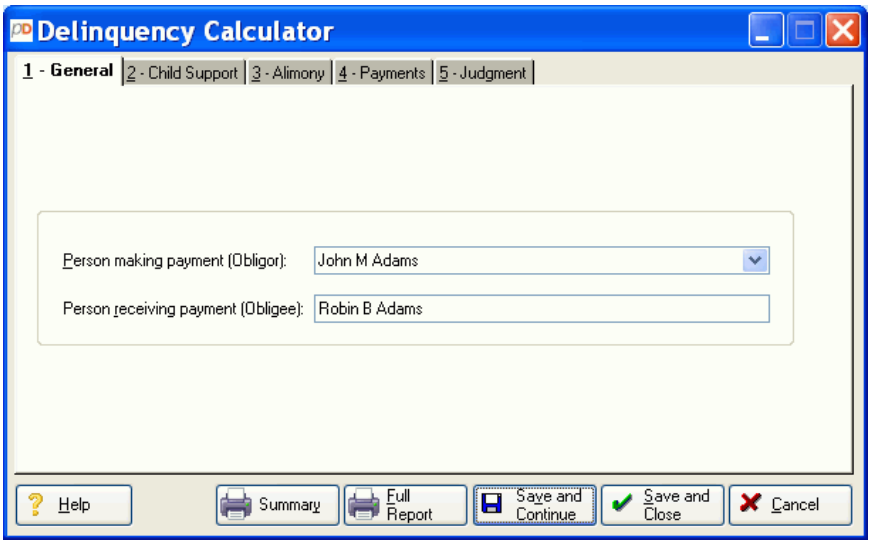



Figure 2, General Form

Enter the names of the Obligor (person making payment) and the Obligee (person receiving payment) in their corresponding fields on this form. If you have previously assembled documents and entered the name of the Obligor and Obligee a drop-down arrow will appear to the right of the **Person making payment (Obligor)** field. Click the drop-down arrow to select the Obligor's name from a list that appears. The Obligee's field will be auto-filled when you select the Obligor's name. If you have not provided the names of the Obligor and Obligee, the drop-down arrow will not appear on the form.

# Child Support Form

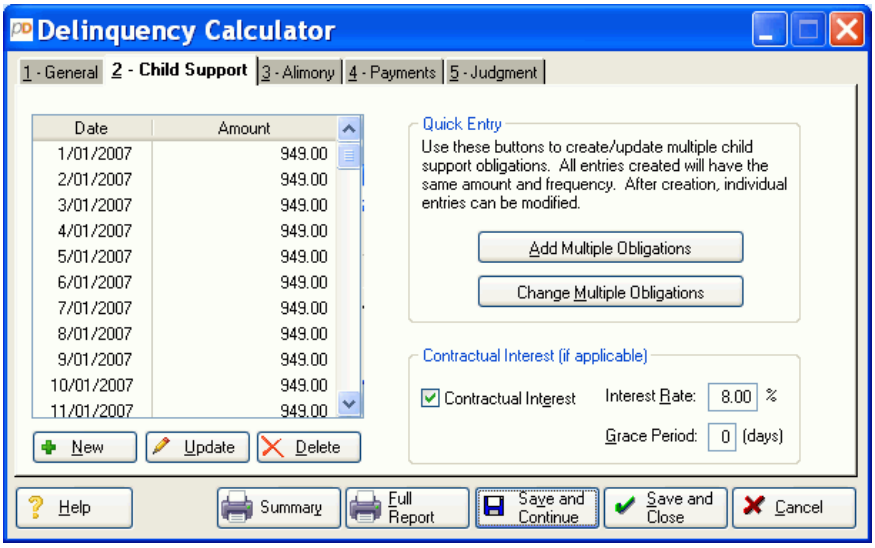



Figure 3, Child Support Form

Child support obligations are entered on this form. You can enter a **single** [103] child support obligation, or **multiple** [104] child support obligations. If contractual interest (instead of statutory interest) is applicable, you can set the interest amount to be applied. You may also provide a grace period for contractual interest. A grace period allows the obligor to make payment within a specified number of days after the payment due date before interest starts accruing.

### Adding Child Support Obligations

To add a child support obligation:

1. Click **New.**
2. The **Child Support Obligation** window appears.
   a. Enter the date that the obligation is due.
   b. Enter the amount of the obligation.
      i. If you have more obligations to enter, click **Repeat.**
      ii. Enter the date and amount of the new obligation.
      iii. Click **Repeat** and enter the requested information until you have entered all of the obligations you want to record.
   c. Click **OK.**
3. If contractual interest applies, check the **Contractual Interest** checkbox and enter the **Interest Rate** and **Grace Period** (number of days before the interest starts to accrue).

**NOTE:** **Statutory interest** is applied by default when contractual interest is not applied to the obligations. Statutory interest does not provide a grace period before interest begins to accrue. Statutory interest is applied from the date the obligation is due until the date the obligation is paid.

You may update an obligation by highlighting it and clicking **Update.** To delete an obligation, highlight it and click **Delete.**

### Adding Multiple Child Support Obligations

The **Add Multiple Obligations** button takes you to a window where you can quickly enter a series of obligations. For example, you could specify semi-monthly obligations of $250.00, beginning on 01/01/06 and ending on 05/30/09 with payments due on the 1st and 15th day of each month. The **Delinquency Calculator** will automatically post the obligations so you don't have to enter each one individually.

To add multiple child support obligations of the same frequency and amount:

1. Click **Add Multiple Obligations.**
2. The **Enter a Range of Child Support Obligations** window appears.
   a. Enter the date range of the obligations in the **Inclusive Dates** section.
   b. In the **Frequency Options** section, choose **Monthly, Semi-monthly** (twice a month), **Weekly** or **Bi-weekly** (every two weeks) as the payment schedule.
   c. In the **Details** section, enter the amount of each child support payment and, depending on the frequency selected, the day(s) that payments are due each month.
   d. Click **OK.**
3. If contractual interest applies, check the **Contractual Interest** checkbox and enter the **Interest Rate** and **Grace Period** (number of days before the interest starts to accrue).

**NOTE:** You can change a range of payments by clicking the **Change Multiple Obligations** button. You can change a single obligation by highlighting the obligation and clicking the **Update** button.

You may update a single obligation by highlighting it and clicking **Update.** To delete an obligation, highlight it and click **Delete.**

## Alimony Form

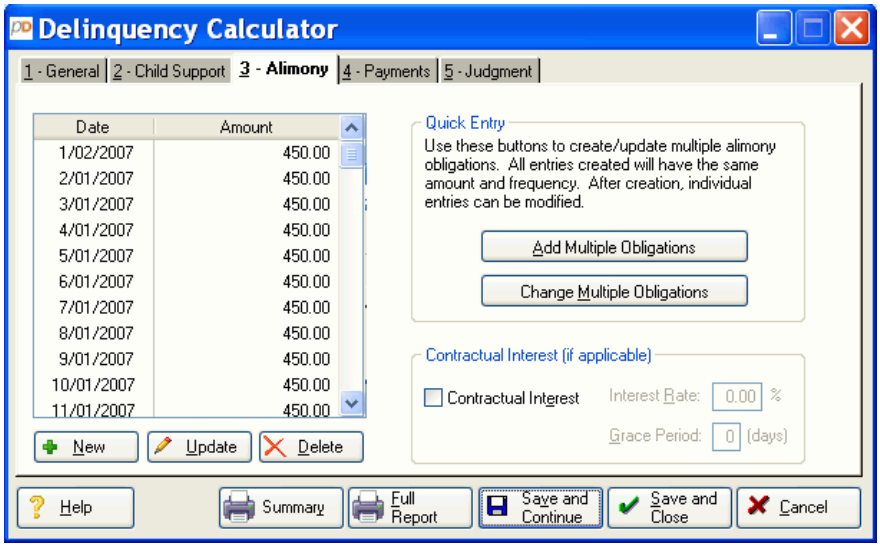



Figure 4, Alimony Form

Alimony obligations are entered on this form. You can enter a **single** 105 alimony obligation or **multiple** 105 alimony obligations. If interest is applicable, you can set the amount of interest to be charged and provide a grace period. A grace period allows the obligor to make payment within a specified number of days after the payment due date before interest starts accruing.

**Adding a Single Alimony Obligation**

To add an alimony obligation:

1. Click **New.**
2. The **Alimony Support Obligation** window appears.
   a. Enter the date that the obligation is due.
   b. Enter the amount of the obligation.
      i. If you have more obligations to enter, click **Repeat.**
      ii. Enter the date and amount of the obligation.
      iii. Click **Repeat** and enter the requested information until you have entered all of the obligations you want to record.
   c. Click **OK.**
3. If contractual interest applies, click the **Contractual Interest** checkbox and enter the **Interest Rate** and **Grace Period** (number of days before the interest starts to accrue).

**NOTE:** **Statutory interest** is automatically applied if contractual interest is not set for the obligations. Statutory interest does not provide a grace period before interest begins to accrue. Statutory interest is applied from the date the obligation is due until the date the obligation is paid.

You may update a single obligation by highlighting it and clicking **Update**. To delete an obligation, highlight it and click **Delete**.

**Adding Multiple Alimony Obligations**

The **Add Multiple Obligations** button takes you to a window where you can quickly enter a series of obligations. For example, you could specify semi-monthly obligations of $250.00, beginning on 01/01/02 and ending on 05/30/05 with payments due on the 1st and 15th day of each month. The **Delinquency Calculator** will automatically post the obligations so you don't have to enter each one individually.

To add multiple alimony obligations of the same frequency and amount:

1. Click **Add Multiple Obligations.**
2. The **Enter a Range of Alimony Obligations** window appears.
   a. Enter the date range of the obligations in the **Inclusive Dates** section.
   b. In the **Frequency options** section, choose **Monthly, Semi-monthly** (twice a month), **Weekly** or **Bi-weekly** (every two weeks) as the payment schedule.
   c. In the **Details** section, enter the amount of each child support payment and, depending on the frequency selected, the day that payments are due each month.
   d. Click **OK**.
3. If contractual interest applies, check the **Contractual Interest** checkbox and enter the **Interest Rate** and **Grace Period** (number of days before the interest starts to accrue).

**NOTE:** You can change a range of payments by clicking the **Change Multiple Obligations** button. You can change a single obligation by highlighting the obligation and clicking the **Update** button.

# Payments Form

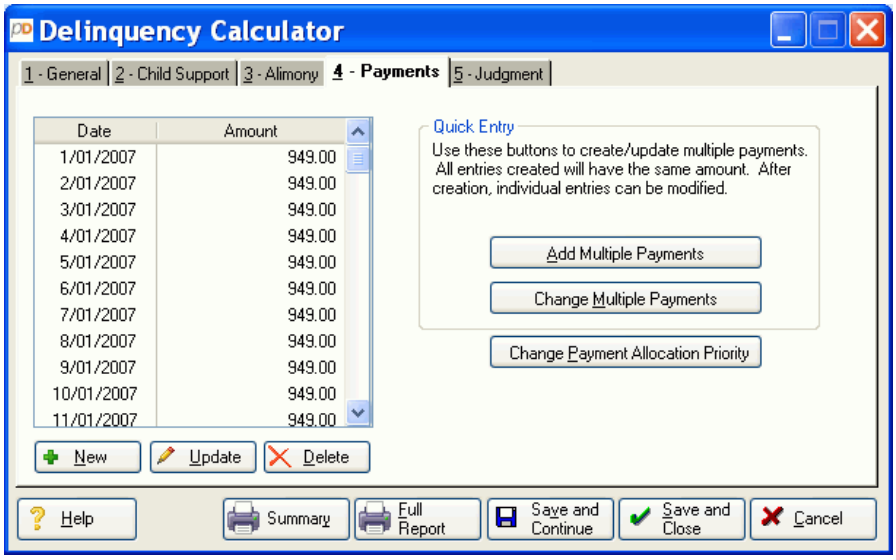



Figure 5, Payments Form

Payments are entered on this form. You can enter a **single** 106 payment or **multiple** 106 payments at a time. Payments are applied based on the **Payment Allocation Priority** 107 list

### Adding Single Payments

To add a single payment:

1. Click **New.**
2. The **Payment** window appears.
   a. Enter the date of the payment.
   b. Enter the amount of the payment.
   c. Click **OK.**

**NOTE:** You may update a single payment by highlighting it and clicking **Update.** To delete a payment, highlight it and click **Delete.**

### Adding Multiple Payments

The **Add Multiple Payments** button takes you to a window where you can quickly enter a series of payments. For example, you could specify semi-monthly payments of $250.00, beginning on 01/01/02 and ending on 05/30/05 with payments due on the 1st and 15th day of each month. The **Delinquency Calculator** will automatically post the payments so you don't have to enter each one individually.

To add multiple payments of the same frequency and amount:

1. Click **Add Multiple Payments.**
2. The **Enter a Range of Payments** window appears.
   a. Enter the date range of the payments in the **Inclusive Dates** section.
   b. In the **Frequency Options** section, choose **Monthly, Semi-monthly** (twice a month), **Weekly** or **Bi-weekly** (every two weeks) as the payment schedule.
   c. In the **Details** section, enter the amount of each payment and, depending on the frequency

selected, the day that payments are due each month.

d. Click **OK.**

**NOTE:** You can change a range of payments by clicking the **Change Multiple Payments** button. You can change single payments by highlighting the payment and clicking the **Update** button.

**Payment Allocation Priorities**

When a payment is recorded in the **Delinquency Calculator,** it is applied according to the order of the payment allocation priority list. The list has payment categories for **Current Child Support**, **Arrearage Child Support**, **Arrearage Child Support Interest**, **Current Alimony**, **Arrearage Alimony**, **Arrearage Alimony Interest**, **Judgment**, **Judgment Interest**, **Attorney's Fees and Costs Interest,** and **Attorney's Fees and Costs**.

Payments are applied in the order that each item appears on the list. The list may be reordered in any order, but the reordered list will only apply to the case in which you are working. You may return the list to its original order by clicking the **Restore Default Priority** button.

Payments are first applied to the items that are currently due or past due in the order they appear on the list. If all of the currently due or past due obligations are covered by the payment, the remainder of the payment is applied starting with the first item on the list and moving to the next item as each item is paid in full.

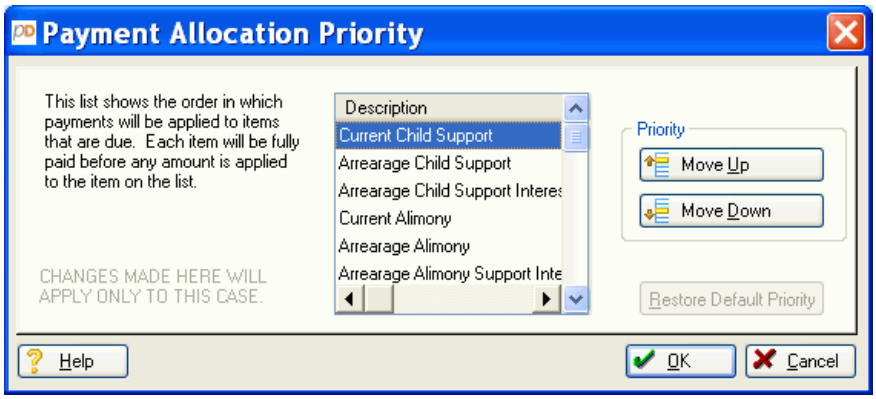

Payment Allocation Priority
This list shows the order in which payments will be applied to items that are due. Each item will be fully paid before any amount is applied to the item on the list.
CHANGES MADE HERE WILL APPLY ONLY TO THIS CASE.
Description
Current Child Support
Arrearage Child Support
Arrearage Child Support Interes
Current Alimony
Arrearage Alimony
Arrearage Alimony Support Inte
Priority
Move Up
Move Down
Restore Default Priority
Help
OK
Cancel

Figure 6, Payment Allocation Priority Window

**Reordering the Payment Allocation Priorities List**

To reorder the **Payment Allocation Priorities** list:

1. Click **Change Payment Allocation Priority.**
2. The **Payment Allocation Priority** window appears.
3. Highlight the item you want to move.
   a. To move the item towards the top of the list, click **Move Up.**
   b. To move the item towards the bottom of the list, click **Move Down.**
4. Click **OK.**

**NOTE:** The order you choose will only apply to the case you have open when you reorder the **Payment Allocation Priorities** list. You may return the **Payment Allocation Priorities** list to its original order by clicking the **Restore Default Priority** button.

# Judgment Form

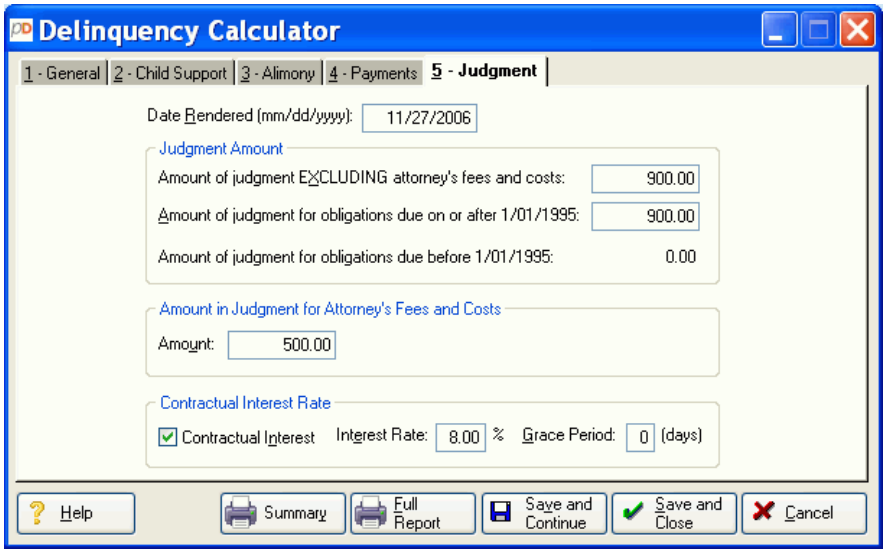



Figure 7, Judgment Form

The **Judgment** form allows you to enter the date of the judgment, obligation amounts, attorney's fees and costs and the contractual interest rate and grace period (if applicable).

To enter information about a judgment:

1. Enter the date that the judgment was rendered in the **Date Rendered** field.
2. In the **Amount of judgment EXCLUDING attorney's fees and costs** field, enter the amount of the judgment minus the amount that was awarded for attorney's fees and costs.
3. Enter the amount of the judgment that was due on or after January 1, 1995 in the **Amount of judgment for obligations due on or after 1/01/1995** field.
4. The amount of the judgment for obligations that were due before January 1, 1995 appears in the **Amount of judgment for obligations due before 1/01/1995** field. This field's total is automatically calculated from the answers that were provided in Steps 2 and 3.
5. Enter the amount that was awarded in attorney's fees and costs in **Amount** field of the **Amount in Judgment for Attorney's Fees and Costs** section.
6. If contractual interest is applied, place a check in the **Contractual Interest** checkbox.
   a. Enter the interest rate to be applied in the **Interest Rate** field.
   b. Enter the number of days to wait before applying interest in the **Grace Period** field.

# UCCJEA Affidavit

This program allows you to:

- Enter information about the parties and the children that are affected by the proceeding.
- Enter the addresses at which the children affected by the proceeding have lived during the last five years.
- Enter names and addresses of nonparties who may have or have had physical custody of the child(ren), or are claiming custody rights to the child(ren) subject to this action.
- Enter child support or other proceedings which concerned the child(ren) affected by this suit in which the Affiant participated or has knowledge.
- Assemble the UCCJEA Affidavit.

The UCCJEA (Uniform Child Custody Jurisdiction and Enforcement Act) Affidavit program is designed to assist you with entering the five year residential history of each child involved in the selected case. As a part of the affidavit, you can enter additional information regarding ancillary matters which affect the children. Finally, you can also list all third-parties claiming visitation and/or custody rights to the children.

To open the **UCCJEA Affidavit** program:

1. On ProDoc's main menu, click **PowerPacks → Family Law → UCCJEA Affidavit.**
2. The **Select a Case** window appears. To find the client you want to use:
   a. Type the first few letters of the client's last name. As you type, the highlight will move to the next match on the client list. To start over, press the **Backspace** key on your keyboard.
   b. You can also use the scroll bar at the right side of the window to scroll through the alphabetical list.
3. When the selected client is highlighted, you can double-click the name, press the right arrow key on your keyboard, or click the **Show Cases** button to view the client's cases.
4. Select a case by double-clicking a case title. You can also click the title once, then press the **Enter** key or click the **Select Case** button.
5. The program opens to the **General** form.

## UCCJEA Toolbar

Figure 1, UCCJEA Toolbar

The toolbar along the bottom of the **UCCJEA Affidavit** program consists of the **Help**, **Assemble**, **Save and Continue**, **Save and Close**, and **Cancel** buttons. The buttons and their actions are discussed below.

**Help** – Click this button to see the help topic for the window you are viewing.

**Assemble** – Click this button to assemble the Uniform Child Custody Jurisdiction and Enforcement Act Affidavit in ProDoc.

**Save and Continue** – Click this button to save your work and continue working in the program.

**Save and Close** – Click this button to save your work and close the program.

**Cancel** – Click this button to exit the program and not save any work that you have done since the last save. A message box will appear and tell you that canceling will cause you to lose all information you entered since the last save, and will ask you if you want to continue. To return to the program to save your work, click **No.** If you do not want to save your work, click **Yes.**

## General Form

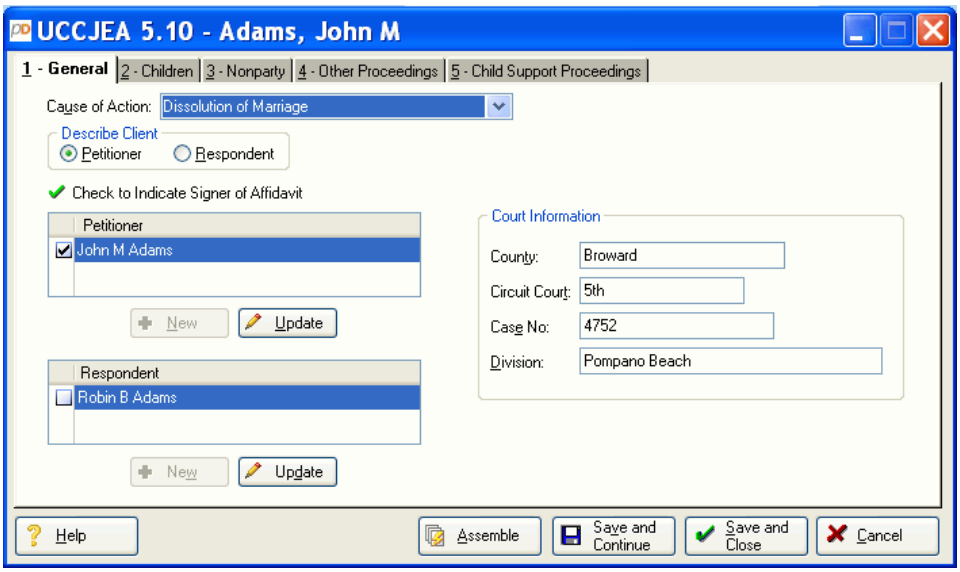



Figure 2, General Form

The information that you provide on the **General** form is the cause of action, whether the client is the petitioner or respondent, the petitioner's and respondent's names, which petitioner or respondent will be signing the affidavit and the county, circuit court, case number and division of the court.

You may choose the cause of action from the list of causes of action that is provided. Click the drop-down arrow to the right of the **Cause of Action** field to display the list. The causes of action from which you may choose are **Dissolution of Marriage, Request for Support Unconnected with Dissolution, Stepparent Adoption, Domestic/Repeat Violence, Name Change** or **Paternity.**

If you choose **Stepparent Adoption** as the cause of action, you may enter more than one petitioner. All other causes of action allow for only one petitioner and one respondent.

If the cause of action is a **Stepparent Adoption** and you do enter more than one petitioner, you must place a check mark beside the petitioner that is the signer of the affidavit.

If the petitioner's or respondent's names do not appear in the list in the **Petitioner** or **Respondent** window, you may add them to the list. To add the name of a petitioner or respondent to the list:

1. Click the **New** button located below the **Petitioner** or **Respondent** window.
2. The **Petitioner will be Added** or **Respondent will be Added** window appears.
3. Enter the name of the petitioner or respondent.
4. Click **OK.**

To change or correct the name of either the Petitioner or Respondent, click the desired name and click the **Update** button below the name. After you update the name, click **OK** to save the changes or **Cancel** to discard the changes.

In the **Court Information** section, enter the requested information for the court.

## Children Form

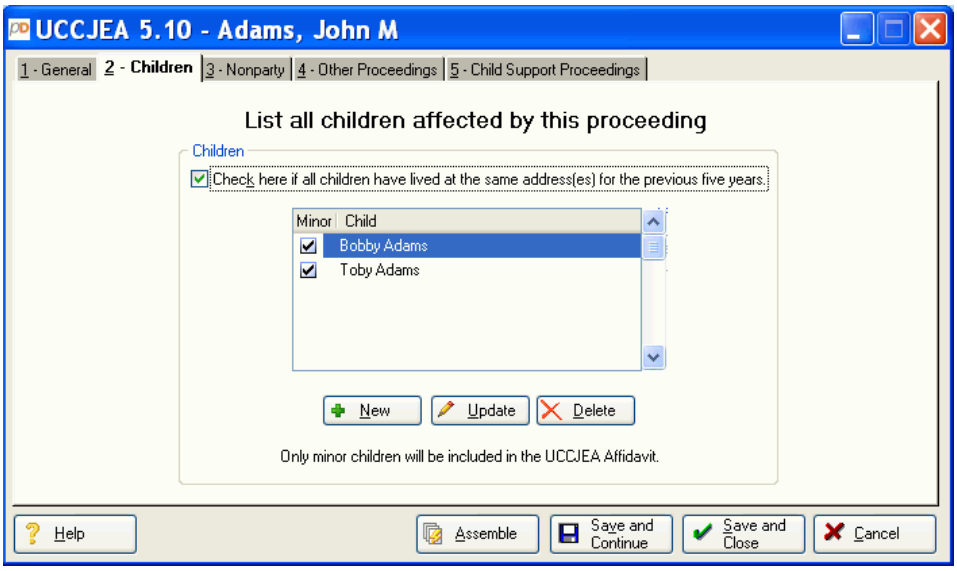



Figure 3, Children Form

The **Children** form lists the children that are affected by the proceeding. From this form you can enter the children and the addresses in which they resided for the previous five years.

The UCCJEA Affidavit only includes minor children. You may add adult dependent children via the program (such as a child that is 18 years old and still enrolled in high school), but their information will not appear in the affidavit. If the child is 17 or younger, a check mark automatically appears in the **Minor** column and you will be asked to provide the child's addresses for the previous five years. If the child is 18 or older, a check mark will not appear in the **Minor** column and the user will not be able to enter addresses for the child.

To add children to the list of children affected by the proceeding:

1. Click the box labeled **Check here if all children have lived at the same address(es) for the previous five years** if the children have lived at the same address(es) for the last five years.
    a. By checking this checkbox, any child entered after the initial child (oldest child) will automatically list the same addresses for the last five years as the initial child. If you do check the checkbox, the address section is not available when you enter the second and subsequent children.
    b. If the child is not yet five years old, the addresses where the initial child has lived since the child's birth will be applied.
    c. If you uncheck the **Check here if all children have lived at the same address(es) for the previous five years** checkbox, you will have to enter the addresses for all of the children separately.
2. Click **New.**
3. The **Adding Child Information** window appears. Enter the information for the oldest child first.

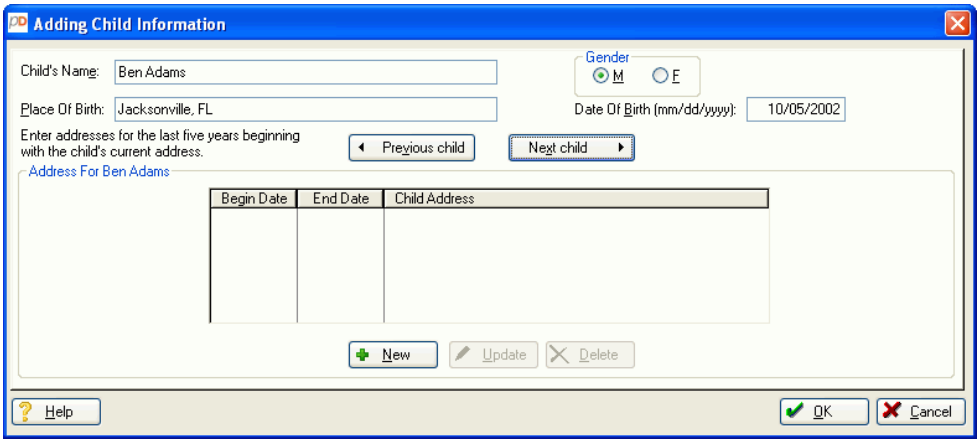



Figure 4, Adding Child Information Window

a. Enter the child's name, gender, place of birth (city and state) and date of birth.

b. Click **New** to add the addresses in which the child has lived for the last five years.

4. The **Adding Child Address Information** window appears. Enter the addresses, starting with the most recent first.

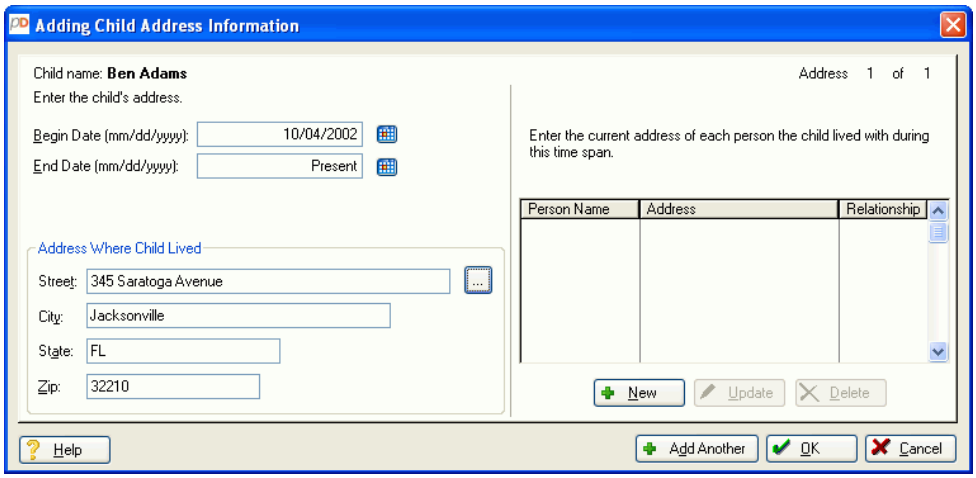



Figure 5, Adding Child Address Information Window

a. Enter or select the date range, for which the selected child has lived at the address, in the **Begin Date** and **End Date** fields.

b. Enter the address at which the child lived during the date range you selected in the **Address Where Child Lived** fields, or click the button with the ellipsis (**…**) to select the address from the list of addresses that have previously been entered for the other children.

c. Enter the current address of each person the child lived with during the date range you entered.

d. Click the **New** button. The **Current Address for Person** window appears.

   i. Enter the name of the person the child lived with. If you have previously entered information for the person in the UCCJEA Affidavit, click the **Available Persons** button and select the person from the list that appears.

   ii. Enter the relationship of the person with whom the child lived in the **Relationship** field (e.g., mother, grandfather).

iii. Enter the current address at which the person the child lived with currently resides.

iv. Click **OK.**

e. If you want to add more addresses for the child, click the **Add Another** button.

f. To add another child or edit a child's existing information without returning to the children list:

i. Click the **Next Child** button to add a new child to the list or to review/edit an existing record.

ii. Click the **Previous Child** button to review/edit previous records in the list.

g. When you finish entering the addresses, click **OK.**

To update a child on the list of children affected by the proceeding:

1. Highlight the child's name on the list of children that appear on the **Children** form.
2. Click **Update.**
3. The **Changing Child Information** window appears.
   a. If you need to change the child's name, gender, place of birth or date of birth, do so and click **OK.**
   b. If you need to change the beginning date, ending date, child's address, person lived with, person's address or relationship, highlight the record you need to change and click **Update.**
   c. The **Changing Child Address Information** window appears. Make the necessary changes.
   d. Click **OK.**

## Nonparty Form

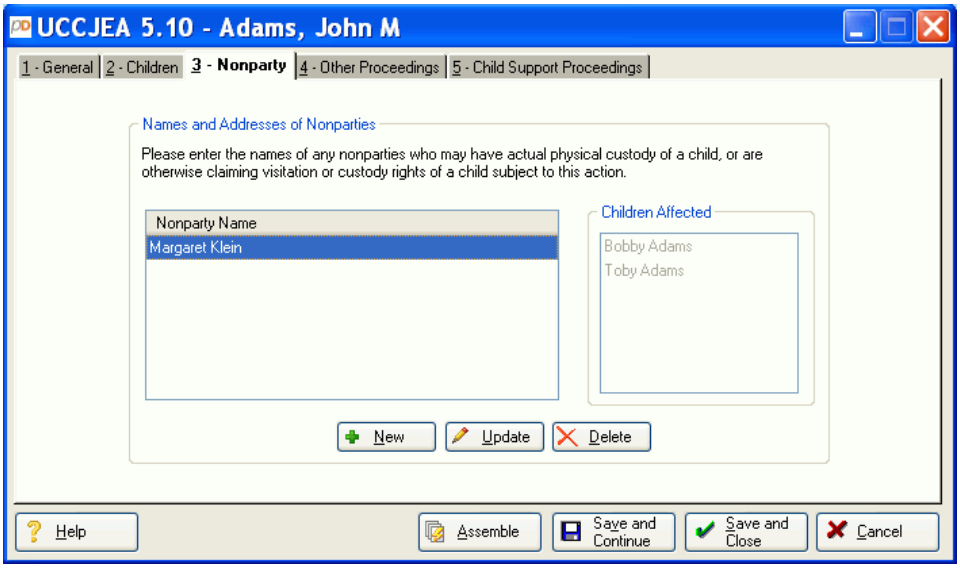



Figure 6, Nonparty Form

The **Nonparty** form allows users to enter the name of a person or persons who are not a party of the current proceeding and who may have actual physical custody of a child, or are claiming visitation or custody rights to a child subject to the current action, and to select the child(ren) who are affected by the rights of the nonparty.

To enter the nonparty claiming actual physical custody, visitation or custody rights to a child subject to the current action:

1. Click **New.**
2. The **Adding Nonparty Information** window appears.

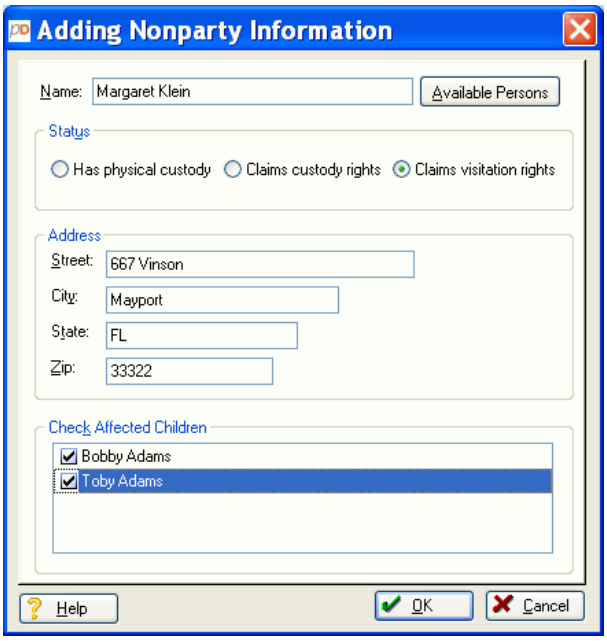



Figure 7, Adding Nonparty Information Window

3. Enter the name of the nonparty. If you have previously entered the nonparty's name elsewhere in the program, click the **Available Persons** button and you can select their name from a list that appears.
   a. In the **Status** section select **Has physical custody**, **Claims custody rights**, or **Claims visitation rights** as the claim.
   b. Enter the nonparty's address.
   c. On the list of children in the **Check Affected Children** section, place a check mark to the left of any affected children.
   d. Click **OK.**

# Other Proceedings Form

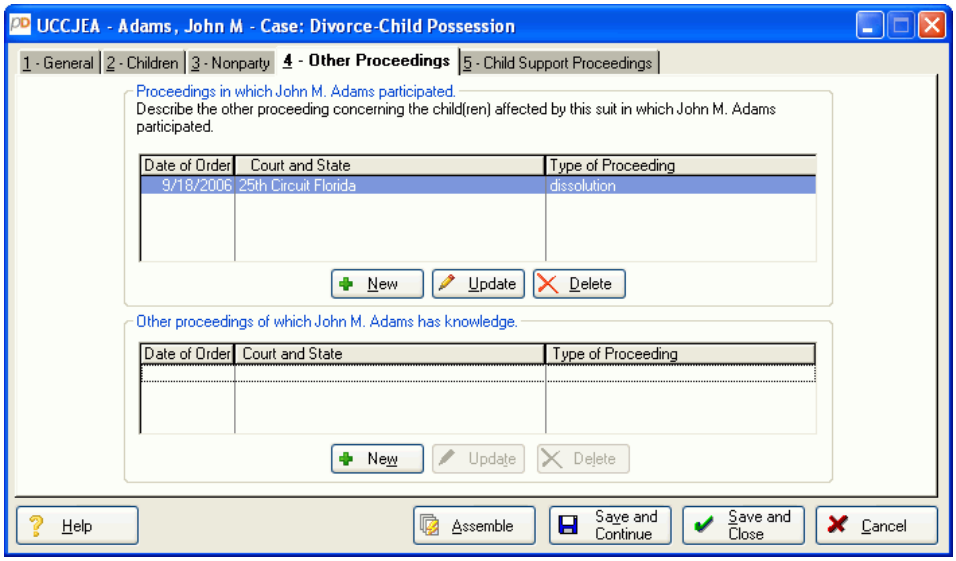



Figure 8, Other Proceedings Form

The **Other Proceedings** form lists other proceedings, in which the affiant was involved or had knowledge, that concern the child(ren) affected by this suit.

To enter other proceedings in which the affiant participated:

1. Click **New** in the upper section (affiant participated in proceeding).
2. The **Adding Other Proceedings Participated In Information** window appears.

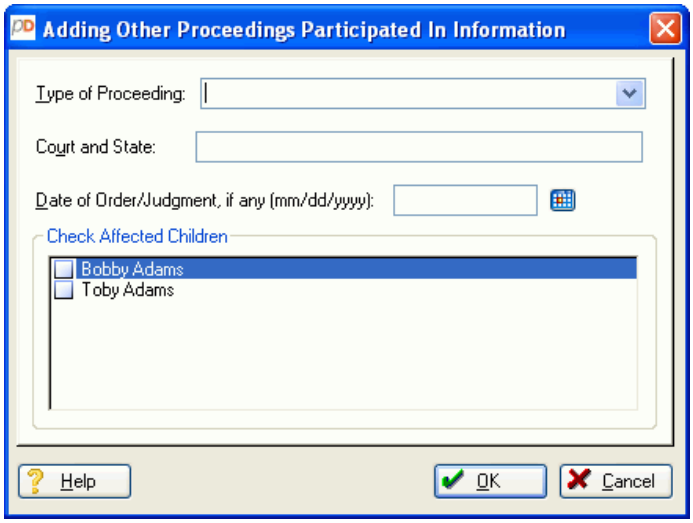



Figure 9, Adding Other Proceedings Participated In Information Window

a. In the **Type of Proceeding** field, select or enter the type of proceeding.

b. Enter the court and state in which the proceeding occurred in the **Court and State** field.

c. In the **Date of Order/Judgment, if any** field, select or enter the date of the order or judgment if there is one.

d. Select any children that are affected by the proceeding from the list in the **Check Affected Children** section.

e. Click **OK.**

To enter other proceedings of which the affiant had knowledge:

1. Click **New** in the lower section (affiant had knowledge of proceeding).
2. The **Adding Information About Other Proceedings** window appears.

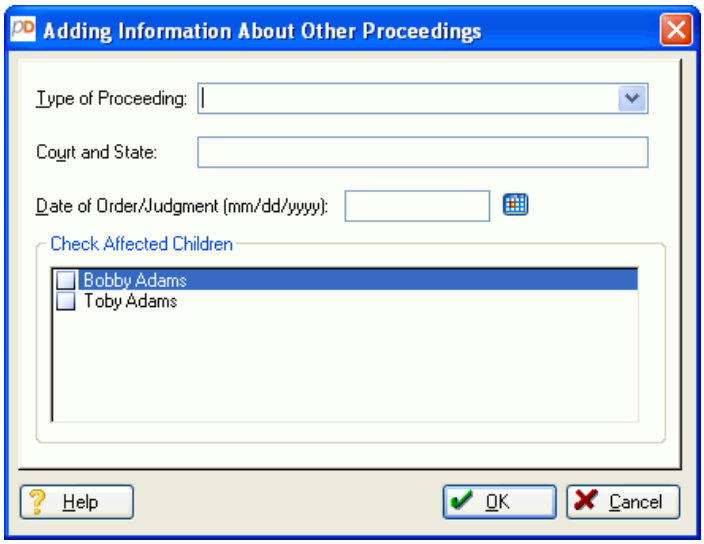



Figure 10, Adding Information About Other Proceedings Window

a. In the **Type of Proceeding** field, select or enter the type of proceeding.

b. Enter the court and state in which the proceeding occurred in the **Court and State** field.

c. In the **Date of Order/Judgment, if any** field, enter or select the date of the order or judgment if there is one.

d. Select any children that are affected by the proceeding from the list in the **Check Affected Children** window.

e. Click **OK.**

# Child Support Proceedings Form

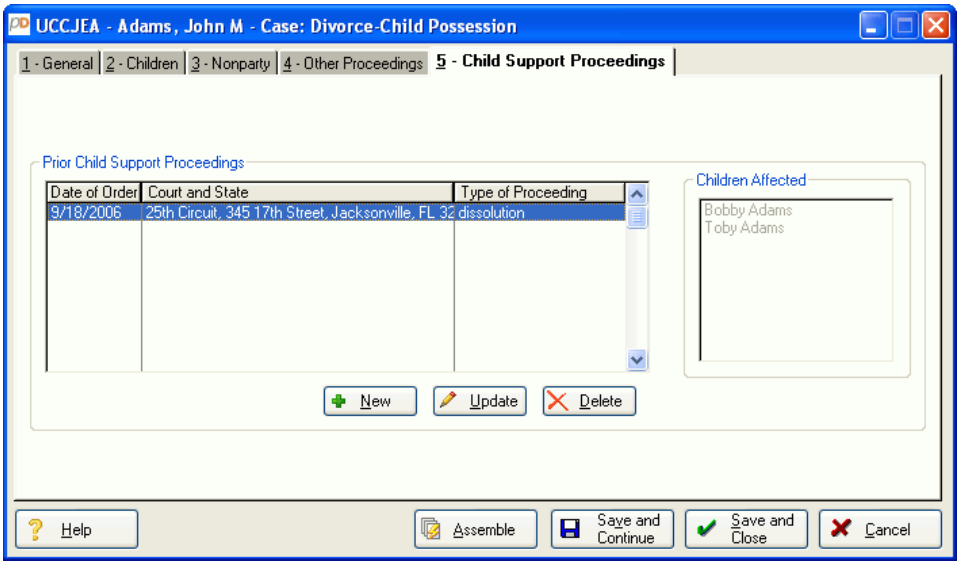



Figure 11, Child Support Proceedings Form

The **Child Support Proceedings** form lists prior child support orders and which children are affected by prior child support orders. Information that you provide consists of the obligor's name, type of proceeding, court and address, date of the order/judgment, the amount paid and the children that are affected by a prior child support order.

To enter information about prior child support proceedings:

1. Click **New** on the **Child Support Proceedings** form.
2. The **Adding Prior Child Support Information** window appears.

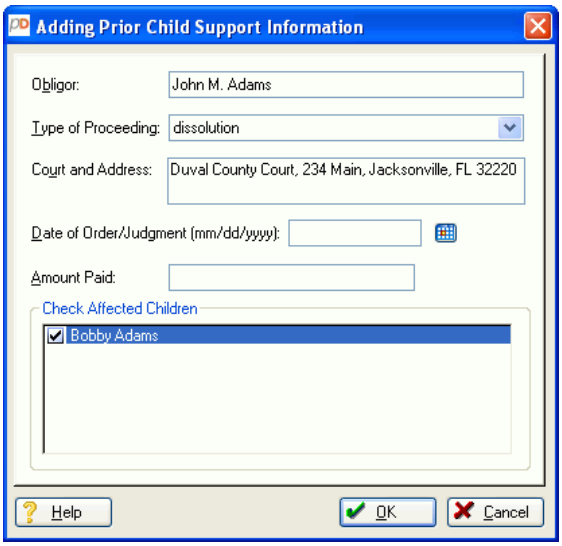



Figure 12, Adding Prior Child Support Information Window

a. Enter the obligor's name in the **Obligor** field.

b. Enter the type of proceeding in the **Type of Proceeding** field. You may click the drop-down arrow to the right of the field and select the type of proceeding from the list that appears or

you may enter the type of proceeding directly in the field.

c. Enter the court in which the proceeding occurred and the address of the court in the **Court and Address** field. Enter the entire court and address information on one line (e.g., 10th Judicial Circuit, as this is how it will appear in the UCCJEA Affidavit. Do not enter the court and address information in block form.

d. Enter or select the date of the order or judgment in the **Date of Order/Judgment** field.

e. In the **Amount Paid** field, enter the amount paid pursuant to the judgment (e.g., 350.00 per month or 6,000 per year). Do not enter a dollar sign in this field because there is already one that appears on the UCCJEA Affidavit.

f. In the **Check Affected Children** section, place a check next to the name(s) of the child(ren) that are affected by the suit.

g. Click **OK.**

3. The proceeding now appears on the **Child Support Proceedings** form. If you highlight the proceeding, the children that are affected by the proceeding are listed in the **Children Affected** section.

# Financial Affidavit (>=$50,000)

The **Family Law Financial Affidavit $50,000 or More** allows you to:

- Prepare a financial affidavit for clients whose individual gross annual income is $50,000 or more;
- Print a detailed statistics sheet;
- Print a financial affidavit.

### Opening the Financial Affidavit (>=$50,000)

On ProDoc's main menu, click **PowerPacks → Family Law → Financial Affidavit (>=$50,000).**

1. The **Select a Case** window appears. To find the client you want to use:
   a. Type the first few letters of the client's last name. As you type, the highlight will move to the next match on the client list. To start over, press the **Backspace** key on your keyboard.
   b. You can also use the scroll bar at the right side of the window to scroll through the alphabetical list.
2. When the selected client is highlighted, you can double-click the name, press the right arrow key on your keyboard, or click the **Show Cases** button to view the client's cases.
3. Select a case by double-clicking a case title. You can also click the title once, then press the **Enter** key or click the **Select Case** button.
4. The program opens to the **Caption** form.

### Navigating the Financial Affidavit

There are 11 tabs across the top of the **Financial Affidavit,** starting with **Caption** and ending with **Statistics.** Each tab represents a different form of the **Financial Affidavit.** To move from one form to another, position the cursor over the tab you want to use and click it. You may also press **ALT** + the desired form's underlined character (Note: if you are pressing alt + the form's underlined number, use the numbers on top row of the keyboard; pressing **Num Lock** and using the numbers on the keypad will not work). You will be shown the form for the tab's underlined character that you choose.

There are multiple fields to complete on each form of the **Financial Affidavit.** To navigate from one field to another, click the field you would like to use, or press the **Tab** key on your keyboard to move forward and the combination of the **Shift** and **Tab** keys to move backwards through the fields.

### Completing the Financial Affidavit

You will need the following information:

**Caption Form** 121: (a) client's name, (b) other party's name, mailing address and fax number, (c) style, (d) circuit court number, (e) case number, (f) county, (g) division of the court, (h) whether this is a dissolution of marriage.

**General Information Form** 122: (a) whether person filing affidavit is Petitioner or Respondent, (b) date of birth, (c) sex, (d) client's employment status, (e) client's occupation, (f), unemployment description of efforts to find a job, how soon employment is expected and the pay rate expected (if not employed) (g) number of jobs currently held, (h) description of current employers' names, addresses, telephone numbers and pay rates, (i) any expected change in job status and how it will affect your income (j) date of retirement (if retired), and the name, address and phone number of the employer from whom the client retired.

**Income Form** 123: (a) previous year, (b) whether filer knows the other party's income for the

previous year, (c) filer's income for the previous year, (d) other party's income for the previous year, (e) total present monthly gross income, (f) total present monthly deductions.

**Taxes Form** 125: (a) client's income tax filing status (post-dissolution), (b) number of dependents claimed, (c) whether you want to manually enter monthly federal income taxes, FICA taxes and Medicare taxes or use the **Tax Calculator** to determine the amounts.

**Expenses Form** 125: (a) household expenses, (b) automobile expenses, (c) monthly expenses for children common to both parties, (d) monthly expenses for children not from this relationship (not child support), (e) monthly insurance, (f) other monthly expenses not otherwise listed, (g) monthly payment to creditors (only for payments made by you on an outstanding balance).

**Assets Form** 126: (a) cash (on hand), (b) cash (in banks or credit unions), (c) stocks/bonds, (d) notes, (e) money owed to filer (not evidenced by a note), (f) real estate (home), (g) real estate (other), (h) business interests, (i) automobiles, (j) boats, (k) other vehicles, (l) retirement plans (profit sharing, pension, IRA, 401(k)s, etc.), (m) furniture and furnishing in home, (n) furniture and furnishings elsewhere, (o) collectibles, (p) jewelry, (q) life insurance (cash surrender value), (r) sporting and entertainment equipment (T.V., stereo, etc.), (s) other assets.

**Liabilities Form** 127: (a) mortgages on real estate (home), (b) mortgages on real estate (other), (c) charge/credit card accounts, (d) auto loans, (e) bank/credit union loans, (f) money filer owes (not evidenced by a note), (g) judgments, (h) other liabilities.

**Contingent Assets Form** 128: contingent assets the filer is requesting the judge award him/her.

**Contingent Liabilities Form** 129: contingent liabilities for which the filer is responsible.

**Finish Form** 130: (a) whether certificate of service is used (date of service and how served), (b) whether other party is represented by an attorney, (c) other party's attorney name, address and fax number, (d) client's attorney name, (e) Child Support Guidelines Worksheet (will worksheet be filed in this case), (f) agreement between the parties that one will take responsibility for a debt and hold the other party harmless from that debt (if such an agreement exists).

**Statistics Form** 131: this is a printable statistics worksheet that provides an overview of the client's monthly net income, total monthly expenses, net worth, and determines if there is a surplus or deficit regarding monthly income.

**Note:** If you are preparing the financial affidavit for a dissolution of marriage, the statistics worksheet also lists assets, liabilities, and contingent assets and liabilities that the filer is requesting, or that are considered non-marital property.

**Financial Affidavit for Family Law Matters Other Than Dissolution of Marriage**

The **Financial Affidavit** must be filed in other family law cases, **except** simplified dissolutions of marriage, enforcement proceedings, contempt proceedings, adoptions, and proceedings for injunctions for domestic or repeat violence. The difference when using a **Financial Affidavit** for matters other than Dissolutions of Marriage is that you do not need to identify whether assets, liabilities, and contingent assets and liabilities are being requested by the filer, and whether they are non-marital property.

## Toolbar

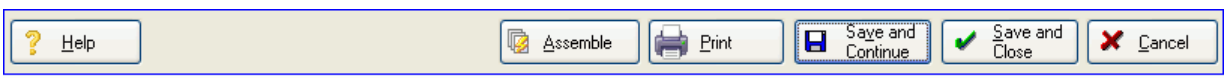



Figure 1, Toolbar

**New / Delete -** These buttons appear on the forms for tabs **Income** and **Expenses** through **Contingent**

**Liabilities.** Clicking the **New** button will add blank lines to the field highlighted, so you may input items not included. Clicking the **Delete** button will remove any lines that you have highlighted.

**Help -** Clicking the **Help** button will take you to the help menu.

**Assemble -** Clicking the **Assemble** button closes the **Financial Affidavit's** window and opens the **Starting Document Assembly** window. From this window you may start a document assembly session for a client. You may save time by unchecking the **Review prior answers** box (this allows you to assemble a document without having to review answers that have been previously entered).

**Print -** Clicking the **Print** button opens a window that asks if you would like to preview the report. Clicking **No** will start the print job. If you click **Yes,** the report will display on the screen and you are given the opportunity to print or exit after previewing the report. Clicking **Cancel** will allow you to remain in the **Financial Affidavit.**

**Save and Continue -** Clicking this button will save any changes you have made to the file.

**Save and Close -** Clicking the **Save and Close** button will close the **Financial Affidavit** window and save any changes you have made to the file. When you return to your client's case, the **Financial Affidavit** will reflect all changes made before you saved the document.

**Cancel -** Clicking the **Cancel** button will display a prompt that asks if you would like to exit without saving. If you click **No,** you will be returned to the **Financial Affidavit** window to finish inputting data. If you click **Yes,** your answers will not be saved and you will exit to the ProDoc Main Menu.

**Note:** If you click the **X** button in the upper right hand corner of the screen, you will exit ProDoc without saving any of the work that you performed. To save your work, always use the **Save and Continue** or **Save and Close** buttons.

## Caption Form

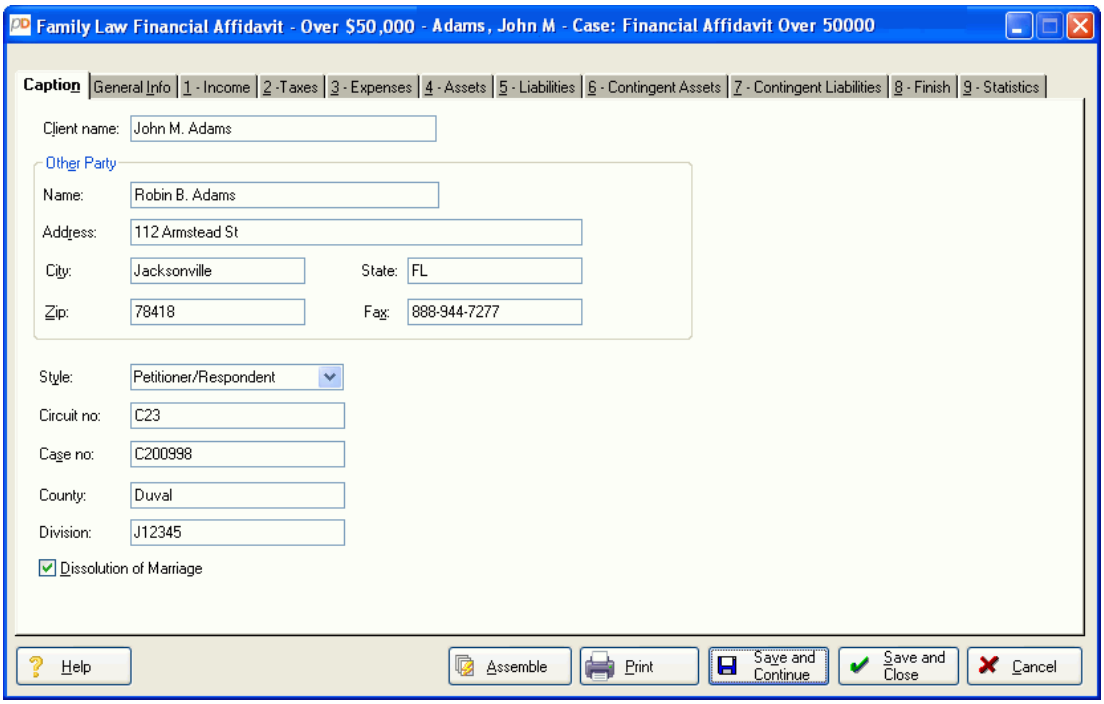



Figure 2, Caption Form

Enter the following information on the **Caption** form: client's name, other party's name, mailing address and fax number, style, circuit court number, case number, county, division of the court and whether this

is a dissolution of marriage.

**Dissolution of Marriage** – Placing a check in this box will add columns for **H** (husband) and **W** (wife) to the right of the value box and a column to the left of the item box in the **Assets, Liabilities, Contingent Assets,** and **Contingent Liabilities** forms. Placing a check in the **H** or **W** box distinguishes that item as the non-marital property or debt of the husband or wife. Check the box to the left of the value box if the filer is requesting to be awarded an asset or is taking responsibility for a debt. A column is also added to the **Expenses** form that allows you to check the box next to **Amount** in order to list that expense as an estimate.

## General Information Form

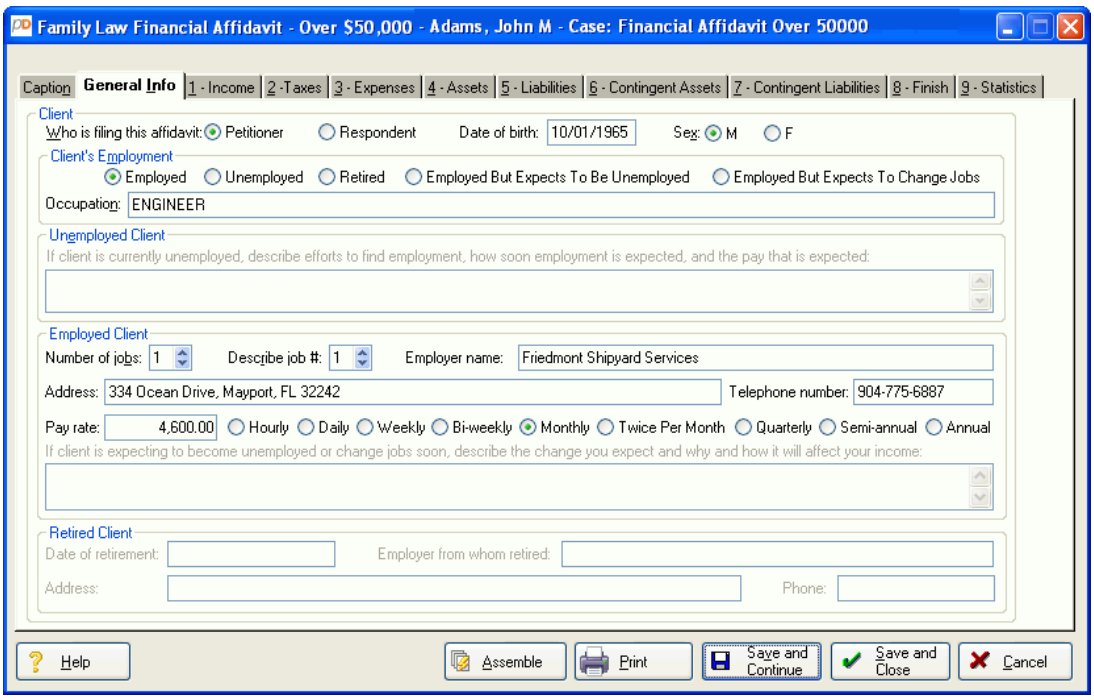

Family Law Financial Affidavit - Over $50,000 - Adams, John M - Case: Financial Affidavit Over 50000
Caption
General Info
1 - Income
2 -Taxes
3 - Expenses
4 - Assets
5 - Liabilities
6 - Contingent Assets
7 - Contingent Liabilities
8 - Finish
9 - Statistics
Client
Who is filing this affidavit: Petitioner Respondent
Date of birth: 10/01/1965
Sex: M F
Client's Employment
Employed Unemployed Retired Employed But Expects To Be Unemployed Employed But Expects To Change Jobs
Occupation: ENGINEER
Unemployed Client
If client is currently unemployed, describe efforts to find employment, how soon employment is expected, and the pay that is expected:
Employed Client
Number of jobs: 1
Describe job #: 1
Employer name: Friedmont Shipyard Services
Address: 334 Ocean Drive, Mayport, FL 32242
Telephone number: 904-775-6887
Pay rate: 4,600.00
Hourly Daily Weekly Bi-weekly Monthly Twice Per Month Quarterly Semi-annual Annual
If client is expecting to become unemployed or change jobs soon, describe the change you expect and why and how it will affect your income:
Retired Client
Date of retirement:
Employer from whom retired:
Address:
Phone:
Help
Assemble
Print
Save and Continue
Save and Close
Cancel

Figure 3, General Form

The information that is requested on the **General Information** form is listed below:

**General Information:** (a) whether person filing affidavit is petitioner or respondent, (b) date of birth, (c) client's sex, (d) client's employment status, (e) client's occupation, (f) number of jobs client currently holds, (g) current employers' names, addresses, telephone numbers and pay rates, (h) unemployment description (if not employed), (i) date of retirement (if retired), and the name, address and phone number of the employer from whom the client retired.

**Client's Employment**

1. If you check **Employed,** you must provide a description of your client's occupation, number of jobs currently held, a description of each job (toggle between jobs by clicking the up or down arrow in the **Describe Job #** box) including the employers' name, address, and telephone number.
   a. You will also need to input your client's pay rate and how often he or she is paid. The pay rate is defaulted to **Monthly.** If your client is paid on a basis other than monthly, make sure to check the appropriate circle.
   b. The pay rate must appear as a monthly figure on the **Financial Affidavit.** ProDoc takes the pay rate you enter and automatically converts it into a monthly figure.
2. If you check **Unemployed,** you must provide an explanation of your client's efforts to find a job,

when your client expects to become employed, and the pay rate he or she expects to receive.

3. If you check **Retired,** you must provide the date your client retired and the name, address and phone number of the employer from whom your client retired.

4. If you check **Employed But Expects To Be Unemployed** or **Employed But Expects To Change Jobs,** you must provide a description of your client's occupation, number of jobs he or she is currently holding, a description of each job (toggle between job descriptions by clicking the up or down arrow in the **Describe Job #** box) including the employers' names, addresses, and telephone numbers. You will also need to input your client's pay rate and how often your client is paid. Lastly, you will be asked to explain the changes your client expects, reason for the change, and how it will affect your client's income.

## Income Form

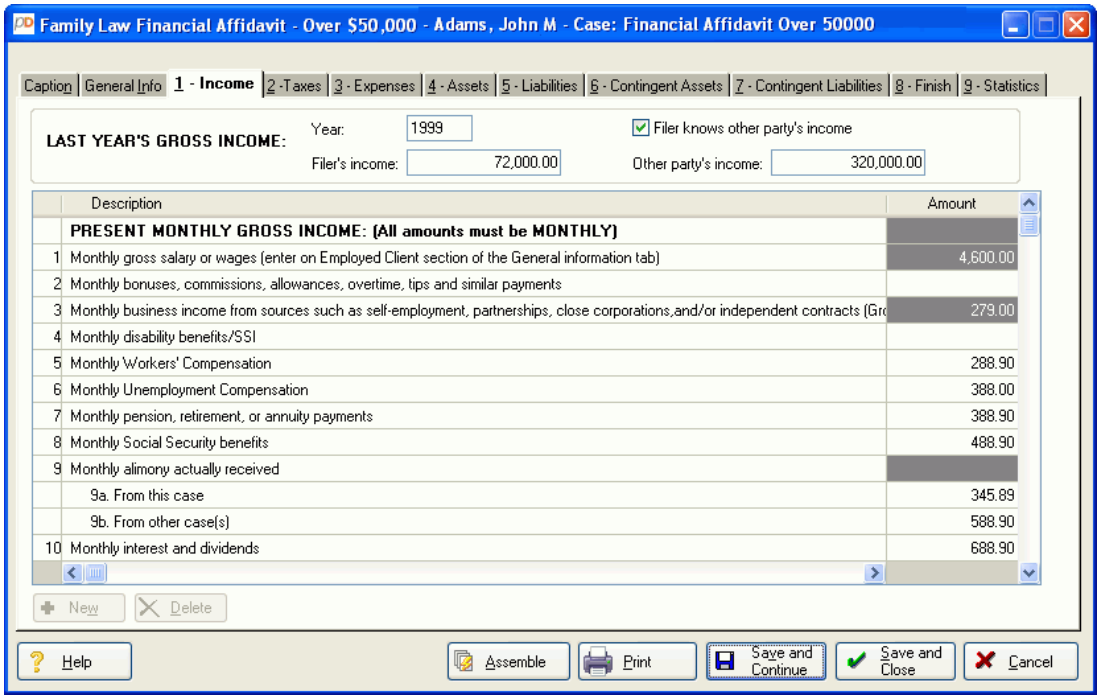

Family Law Financial Affidavit - Over $50,000 - Adams, John M - Case: Financial Affidavit Over 50000
Caption
General Info
1 - Income
2 -Taxes
3 - Expenses
4 - Assets
5 - Liabilities
6 - Contingent Assets
7 - Contingent Liabilities
8 - Finish
9 - Statistics
LAST YEAR'S GROSS INCOME:
Year: 1999
Filer's income: 72,000.00
Filer knows other party's income
Other party's income: 320,000.00
Description
Amount
PRESENT MONTHLY GROSS INCOME: (All amounts must be MONTHLY)
1 Monthly gross salary or wages (enter on Employed Client section of the General information tab) 4,600.00
2 Monthly bonuses, commissions, allowances, overtime, tips and similar payments
3 Monthly business income from sources such as self-employment, partnerships, close corporations,and/or independent contracts (Gr 279.00
4 Monthly disability benefits/SSI
5 Monthly Workers' Compensation 288.90
6 Monthly Unemployment Compensation 388.00
7 Monthly pension, retirement, or annuity payments 388.90
8 Monthly Social Security benefits 488.90
9 Monthly alimony actually received
9a. From this case 345.89
9b. From other case(s) 588.90
10 Monthly interest and dividends 688.90
New
Delete
Help
Assemble
Print
Save and Continue
Save and Close
Cancel

Figure 4, Income Form

**Income** must be input as monthly figures. In the **Last Year's Gross Income** section, enter the previous **Year** and the **Filer's Income** for that year. If your client knows the other party's income, you should input it in the box labeled **Other Party's Income.** The **Financial Affidavit** will place a default of **Unknown** for **Other Party's Income** if the box labeled **Filer Knows Other Party's Income** is left unchecked.

Gross income shall include, but is not limited to, the following:

1. Salary or wages;
2. Bonuses, commissions, allowances, overtime, tips, and other similar payments;
3. Business income from sources such as self-employment, partnership, close corporations, and independent contracts, "Business income" means gross receipts minus ordinary and necessary expenses required to produce income;
4. Disability benefits;
5. Worker's compensation;
6. Unemployment compensation;

7. Pension, retirement or annuity payments;
8. Social security benefits;
9. Spousal support received from a previous marriage or court ordered in the marriage before the court;
10. Interest and dividends;
11. Rental income, which is gross receipts minus ordinary and necessary expenses required to produce the income;
12. Income from royalties, trusts or estates;
13. Reimbursed expenses or in kind payments to the extent that they reduce living expenses;
14. Gains derived from dealings in property, unless the gain is nonrecurring.

The following list can help you determine income as a monthly figure:

**Hourly** –
Hourly wage x Hours worked per week = Weekly income
Weekly income x 52 weeks per year = Yearly income
Yearly income / 12 = **Monthly Income**

**Daily** –
Daily income x Days worked per week = Weekly income
Weekly income x 52 weeks per year = Yearly income
Yearly income / 12 = **Monthly Income**

**Weekly** –
Weekly income x 52 weeks per year = Yearly income
Yearly income / 12 = **Monthly Income**

**Bi-weekly** –
Bi-weekly income x 26 = Yearly amount
Yearly income / 12 = **Monthly Income**

**Bi-monthly** –
Bi-monthly income x 2 = **Monthly Income**

Allowable deductions from gross income include:

1. Federal, state and local income tax deductions, adjusted for actual filing status and allowable dependents and income tax liabilities;
2. Federal insurance contributions or self-employment tax;
3. Monthly Medicare payments;
4. Mandatory union dues;
5. Mandatory retirement payments;
6. Health insurance payments, excluding payments for coverage of the minor child;
7. Court-ordered support for other children which is actually paid;
8. Spousal support paid pursuant to a court order from a previous marriage or the marriage before the court.

# Taxes Form

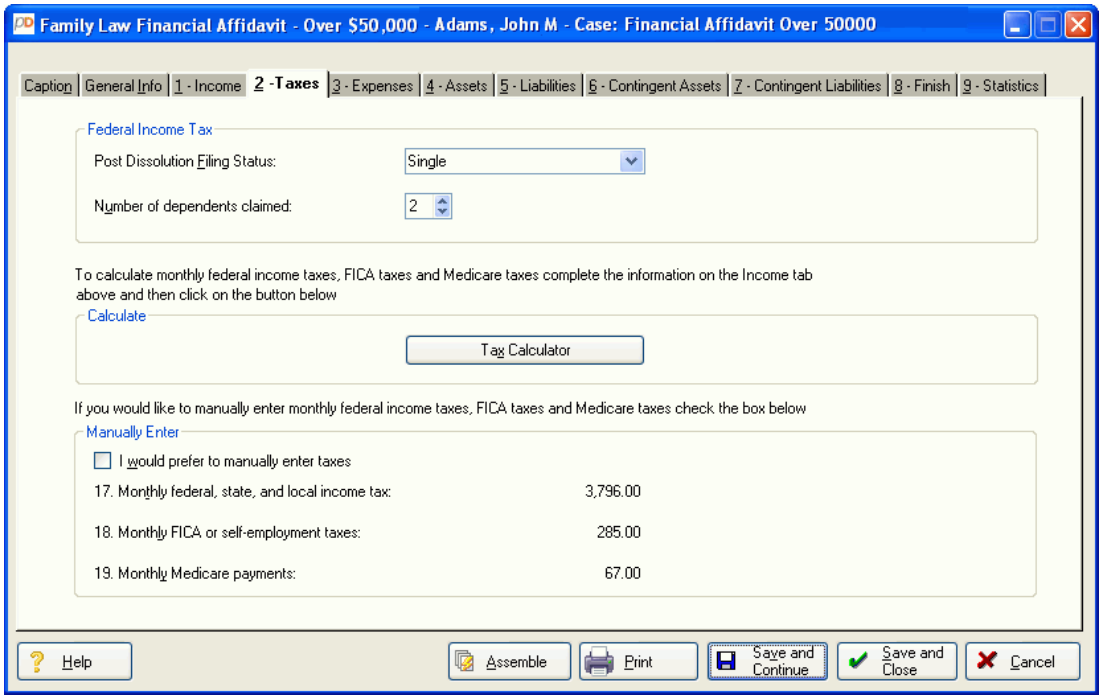

Family Law Financial Affidavit - Over $50,000 - Adams, John M - Case: Financial Affidavit Over 50000
Caption
General Info
1 - Income
2 -Taxes
3 - Expenses
4 - Assets
5 - Liabilities
6 - Contingent Assets
7 - Contingent Liabilities
8 - Finish
9 - Statistics
Federal Income Tax
Post Dissolution Filing Status:
Single
Number of dependents claimed:
2
To calculate monthly federal income taxes, FICA taxes and Medicare taxes complete the information on the Income tab above and then click on the button below
Calculate
Tax Calculator
If you would like to manually enter monthly federal income taxes, FICA taxes and Medicare taxes check the box below
Manually Enter
I would prefer to manually enter taxes
17. Monthly federal, state, and local income tax:
3,796.00
18. Monthly FICA or self-employment taxes:
285.00
19. Monthly Medicare payments:
67.00
Help
Assemble
Print
Save and Continue
Save and Close
Cancel

Figure 5, Taxes Form

Select the filer's filing status and number of dependents being claimed. You may manually enter the filer's federal income, FICA and Medicaid taxes or you may click the **Tax Calculator** button to automatically calculate these taxes.

# Expenses Form

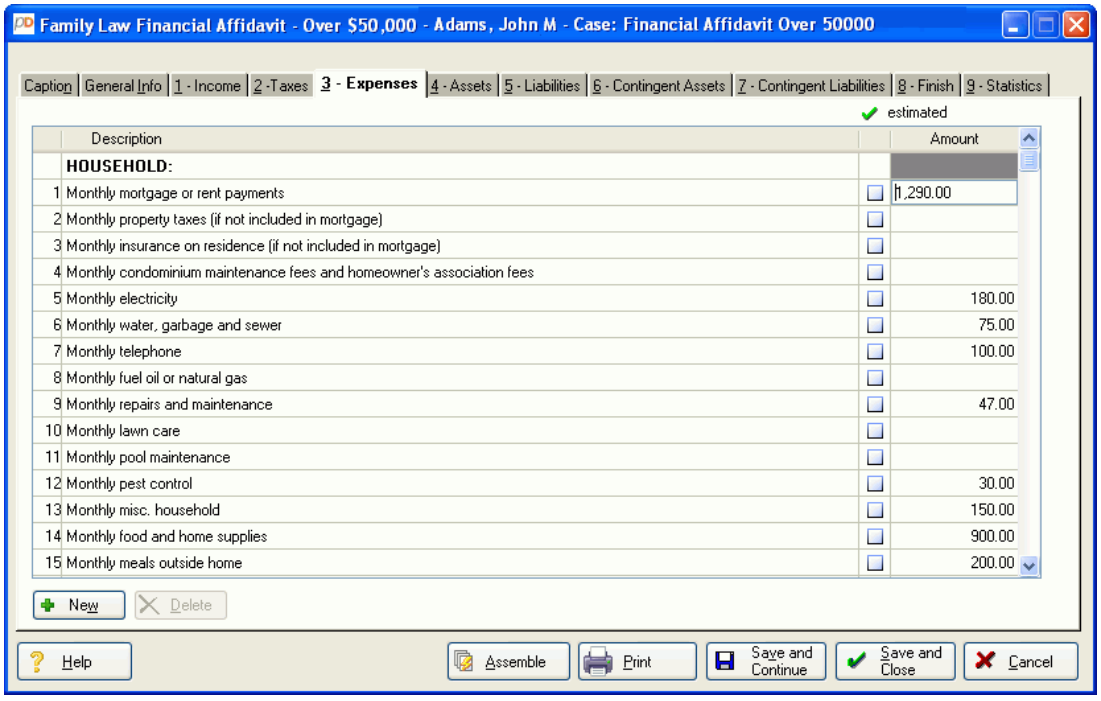

Family Law Financial Affidavit - Over $50,000 - Adams, John M - Case: Financial Affidavit Over 50000
Caption
General Info
1 - Income
2 -Taxes
3 - Expenses
4 - Assets
5 - Liabilities
6 - Contingent Assets
7 - Contingent Liabilities
8 - Finish
9 - Statistics
estimated
Description
Amount
HOUSEHOLD:
1 Monthly mortgage or rent payments 1,290.00
2 Monthly property taxes (if not included in mortgage)
3 Monthly insurance on residence (if not included in mortgage)
4 Monthly condominium maintenance fees and homeowner's association fees
5 Monthly electricity 180.00
6 Monthly water, garbage and sewer 75.00
7 Monthly telephone 100.00
8 Monthly fuel oil or natural gas
9 Monthly repairs and maintenance 47.00
10 Monthly lawn care
11 Monthly pool maintenance
12 Monthly pest control 30.00
13 Monthly misc. household 150.00
14 Monthly food and home supplies 900.00
15 Monthly meals outside home 200.00
New
Delete
Help
Assemble
Print
Save and Continue
Save and Close
Cancel

Figure 6, Expenses Form

**Expenses** must be input as monthly figures. If you need to convert your expenses to a monthly figure you may convert them using the same formulas provided in the **Income Form** topic. If you have placed a check in the box for dissolution of marriage, a box will appear next to the **Expense** amount. Place a check in this box if the expense is an estimate.

## Assets Form

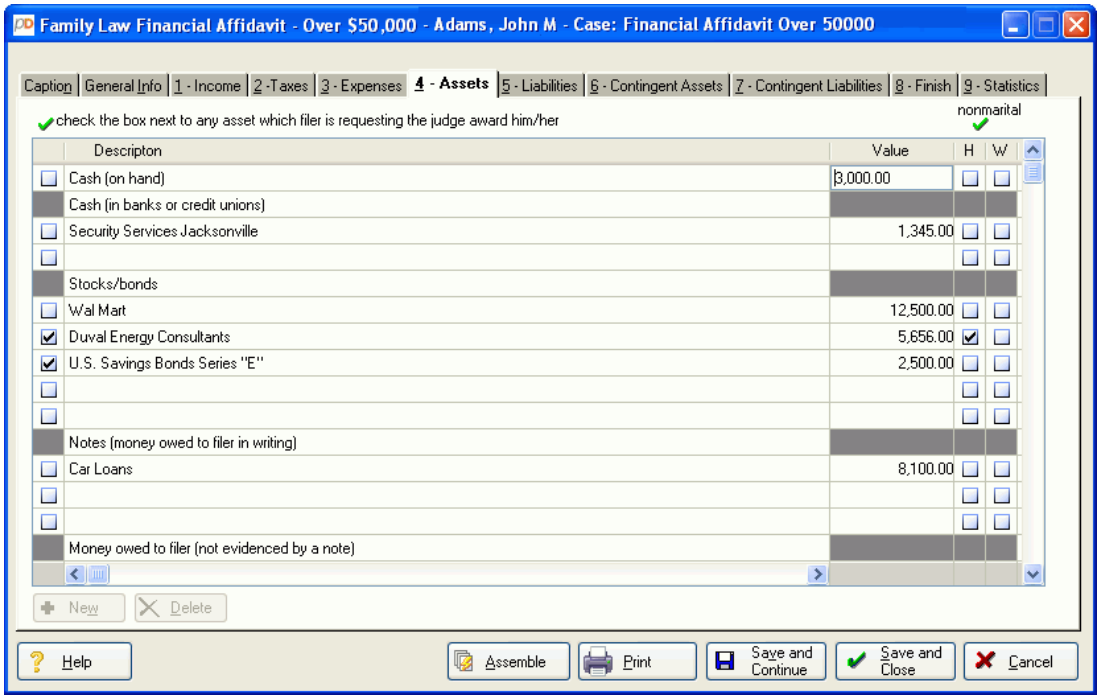



Figure 7, Assets Form

**Assets** is a list of all assets (property) owned by the filer, or between the couple (if a dissolution of marriage). It is important to place a value on all assets. If this is a **dissolution of marriage,** boxes will appear to the right and left of the **Description** and **Value** boxes. The box to the left of the **Description** box is to be checked if the filer requests the judge award the asset to him/her. The boxes to the right of **Value** indicate to whom you believe the asset(s) belong. Check the **H** (husband) or **W** (wife) box, if the asset(s) are non-marital, to indicate whose property you believe the asset to be.

# Liabilities Form

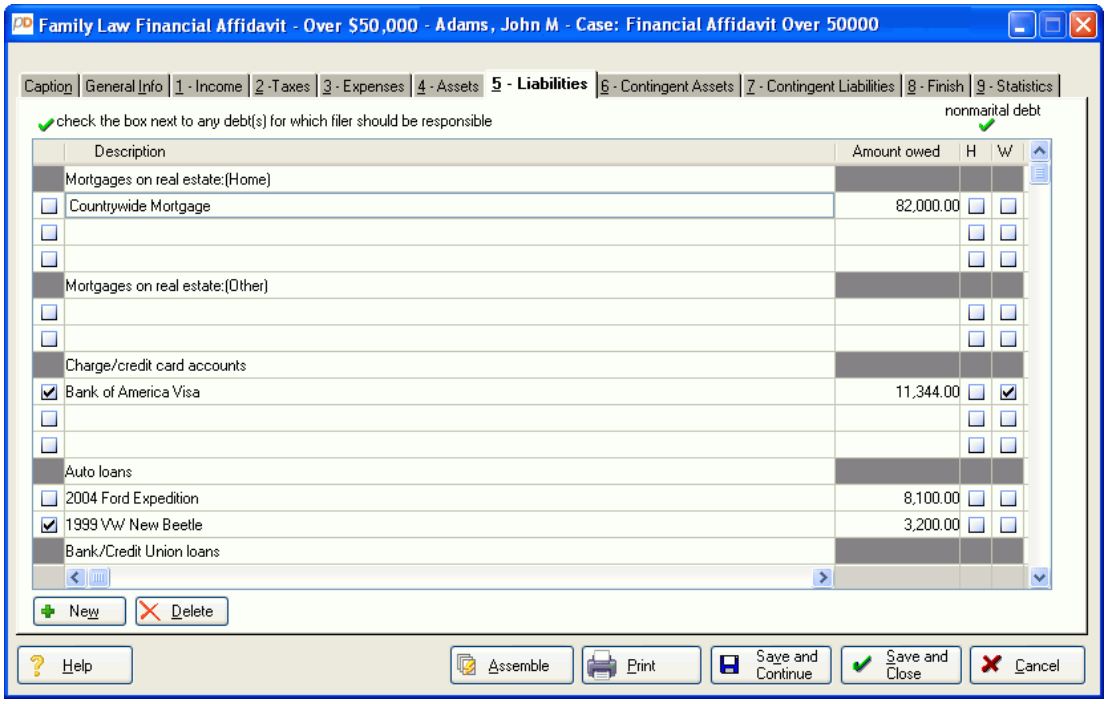



Figure 8, Liabilities Form

**Liabilities** is a list of all liabilities (debts) incurred by the filer, or between the couple (if a dissolution of marriage). It is important to place a value on all liabilities. If this is a **dissolution of marriage,** boxes will appear to the right and left of the **Description** and **Amount Owed** boxes. The box to the left of the **Description** box is to be checked if the filer should be responsible for the debt(s). The boxes to the right of **Amount Owed** indicate to whom you believe the debt(s) belong. Check the **H** (husband) or **W** (wife) box, if the debt(s) are non-marital, to indicate whose responsibility you believe the liability to be.

# Contingent Assets Form

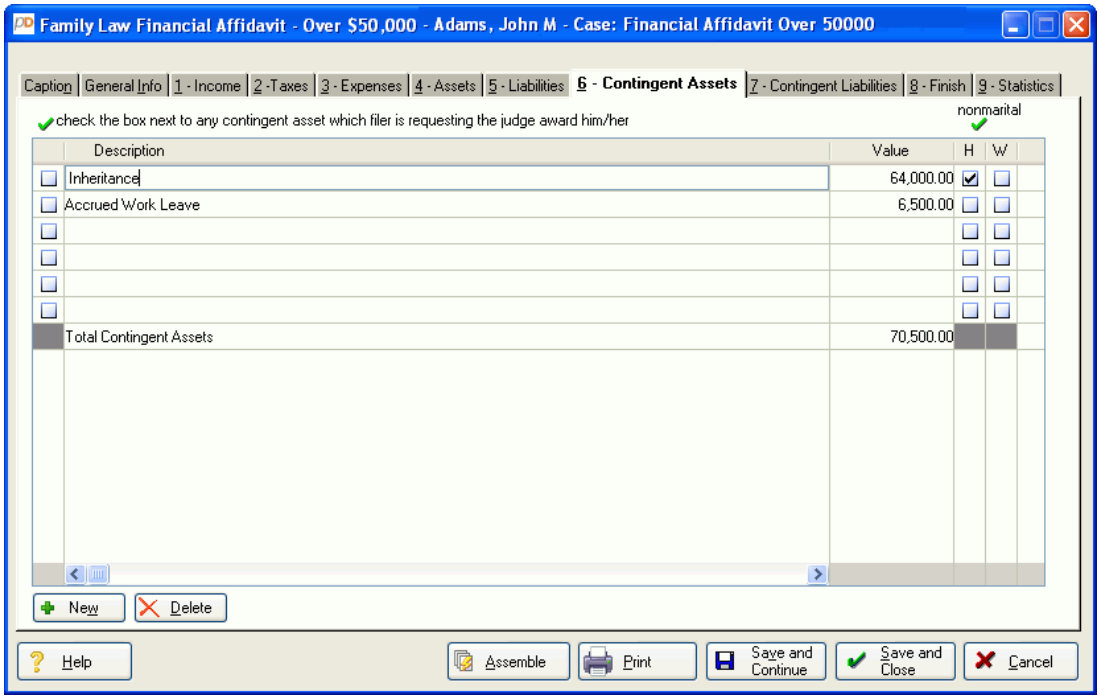



Figure 9, Contingent Assets Form

Examples of **Contingent Assets** include income potential, accrued vacation or sick leave, bonus, inheritance, etc. If you have any possible assets, you must list them here. If this is a **dissolution of marriage,** boxes will appear to the right and left of the **Description** and **Value** boxes. The box to the left of the **Description** box is to be checked if the filer requests the judge award the contingent asset to him/her. The boxes to the right of **Value** indicate to whom you believe the item(s) belong. Check the **H** (husband) or **W** (wife) box, if the contingent asset(s) are non-marital, to indicate whose property you believe the asset to be.

# Contingent Liabilities Form

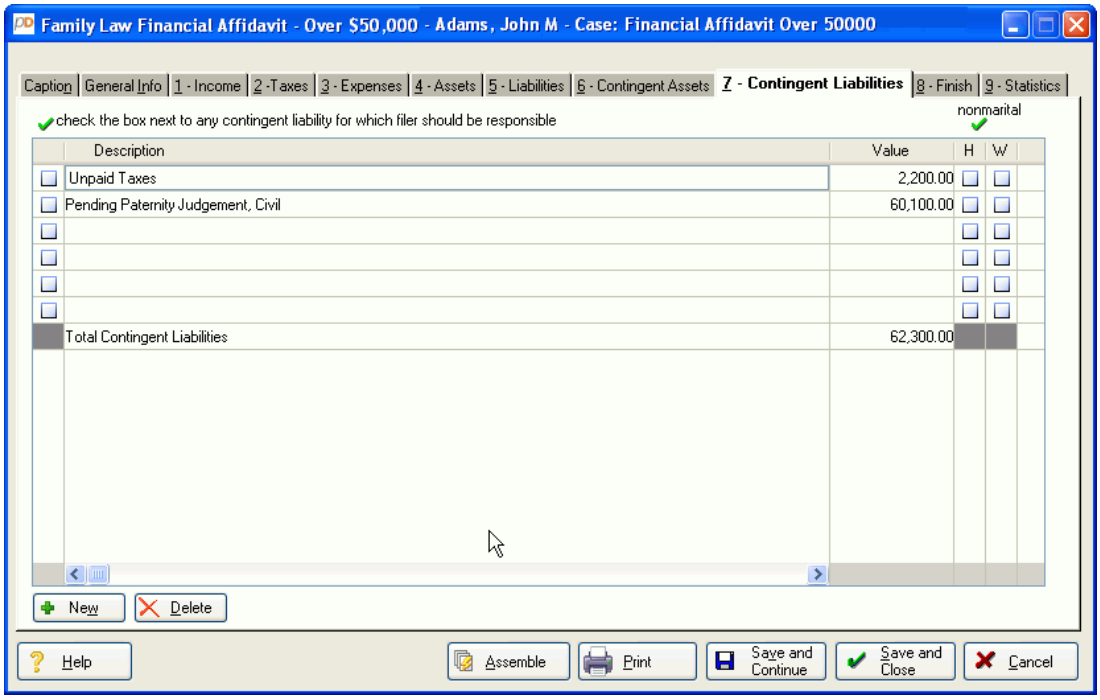



Figure 10, Contingent Liabilities Form

Examples of **Contingent Liabilities** include possible lawsuits, future unpaid taxes, contingent tax liabilities, debts assumed by another, etc. If the client has any possible liabilities, you must list them here. If this is a **dissolution of marriage,** boxes will appear to the right and left of the **Description** and **Value** boxes. The box to the left of the **Description** box is to be checked if the filer should be responsible for the contingent debt(s). The boxes to the right of **Value** indicate to whom you believe the debt(s) belong. Check the **H** (husband) or **W** (wife) box, if the debt(s) are non-marital, to indicate whose responsibility you believe the contingent liability to be.

# Finish Form

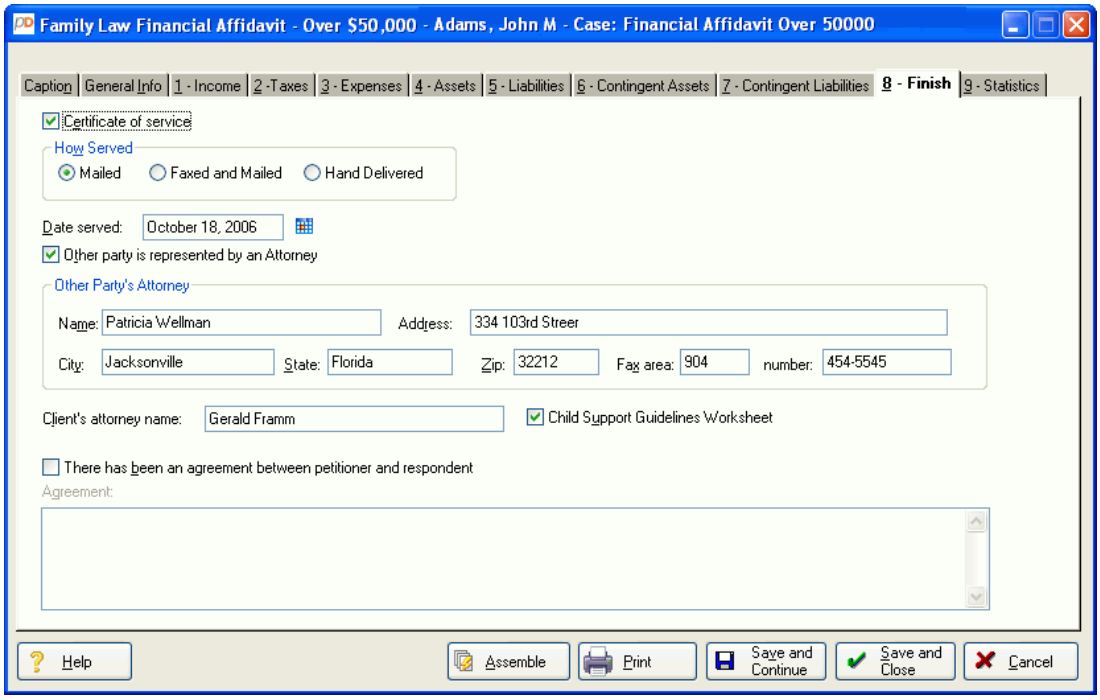



Figure 11, Finish Form

Enter whether there is a certificate of service, how it was served and the date of service, and any information regarding the other party's attorney.

Check the **Child Support Guidelines Worksheet** box if a worksheet **is** or **will be** filed in this case. You **must** file a worksheet if the case involves the establishment or modification of child support.

If there is an agreement between the parties that one will take responsibility for a debt and hold the other party harmless from that debt, then check the box entitled **There has been an agreement between the petitioner and the respondent.** A text box will appear underneath the box you checked. Fully describe the agreement reached between the parties here.

# Statistics Form

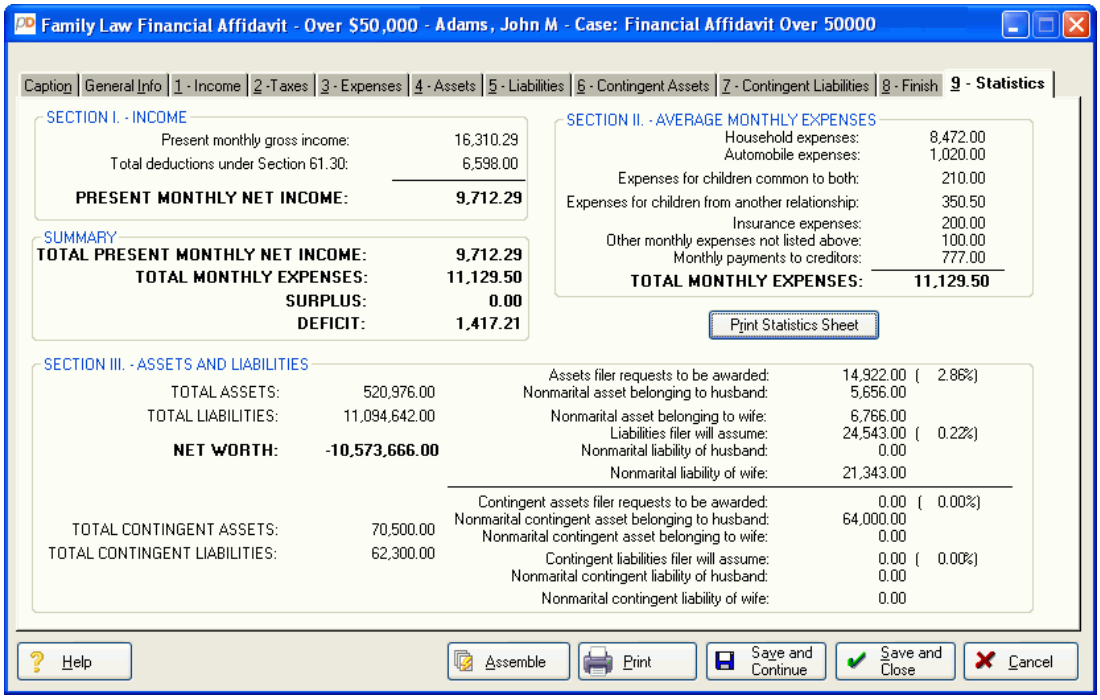

Family Law Financial Affidavit - Over $50,000 - Adams, John M - Case: Financial Affidavit Over 50000
Caption
General Info
1 - Income
2 -Taxes
3 - Expenses
4 - Assets
5 - Liabilities
6 - Contingent Assets
7 - Contingent Liabilities
8 - Finish
9 - Statistics
SECTION I. - INCOME
Present monthly gross income: 16,310.29
Total deductions under Section 61.30: 6,598.00
PRESENT MONTHLY NET INCOME: 9,712.29
SUMMARY
TOTAL PRESENT MONTHLY NET INCOME: 9,712.29
TOTAL MONTHLY EXPENSES: 11,129.50
SURPLUS: 0.00
DEFICIT: 1,417.21
SECTION II. - AVERAGE MONTHLY EXPENSES
Household expenses: 8,472.00
Automobile expenses: 1,020.00
Expenses for children common to both: 210.00
Expenses for children from another relationship: 350.50
Insurance expenses: 200.00
Other monthly expenses not listed above: 100.00
Monthly payments to creditors: 777.00
TOTAL MONTHLY EXPENSES: 11,129.50
Print Statistics Sheet
SECTION III. - ASSETS AND LIABILITIES
TOTAL ASSETS: 520,976.00
TOTAL LIABILITIES: 11,094,642.00
NET WORTH: -10,573,666.00
TOTAL CONTINGENT ASSETS: 70,500.00
TOTAL CONTINGENT LIABILITIES: 62,300.00
Assets filer requests to be awarded: 14,922.00 ( 2.86%)
Nonmarital asset belonging to husband: 5,656.00
Nonmarital asset belonging to wife: 6,766.00
Liabilities filer will assume: 24,543.00 ( 0.22%)
Nonmarital liability of husband: 0.00
Nonmarital liability of wife: 21,343.00
Contingent assets filer requests to be awarded: 0.00 ( 0.00%)
Nonmarital contingent asset belonging to husband: 64,000.00
Nonmarital contingent asset belonging to wife: 0.00
Contingent liabilities filer will assume: 0.00 ( 0.00%)
Nonmarital contingent liability of husband: 0.00
Nonmarital contingent liability of wife: 0.00
Help
Assemble
Print
Save and Continue
Save and Close
Cancel

Figure 12, Statistics Form

**Statistics** is a worksheet that calculates and shows present monthly net income, total monthly expenses, total assets and liabilities, net worth, and whether there is a surplus or deficit income. If you checked the **Dissolution of Marriage** box on the **Caption** form, a box will appear on the statistics worksheet that lists assets, liabilities, and contingent assets and liabilities (including nonmarital) each party will assume. If you did not check the **Dissolution of Marriage** box on the **Caption** form, the box will not appear. To print the statistics worksheet, click **Print Statistics Sheet.** A question box will appear that asks if you would like to preview the report. If you choose **Yes,** a window will open that shows the statistics worksheet. You may view the completed document from this screen or click the printer on the toolbar to print the report. If you choose **No,** the report will print. If you choose **Cancel,** the preview box disappears and returns you to the **Statistics** form.

# Equitable Distribution System

The **Equitable Distribution System** allows you to:

- Enter information related to the parties and their marital and nonmarital property,
- Create scenarios to display and save different divisions of the marital property,
- List and assign marital and nonmarital property,
- Determine after tax property values,
- View pre-tax and after tax statistics for the assets and net estate amounts.

The **Equitable Distribution System** is used to gather information about the parties' marital and nonmarital property and how it is to be divided. This information is used to assemble marriage settlement agreements, final judgments of dissolution and final judgments. There is an **Equitable Distribution System** for marriages with property that is greater than or equal to $50,000 and an **Equitable Distribution System** for marriages with property that is less than $50,000.

To open the **Equitable Distribution System**:

1. On ProDoc's main menu, click **PowerPacks → Family Law,** then either **Equitable Distribution System >=$50,000** or **Equitable Distribution System <$50,000.**
2. The **Select a Case** window appears. To find the client you want to use:
   a. Type the first few letters of the client's last name. As you type, the highlight will move to the next match on the client list. To start over, press the **Backspace** key on your keyboard.
   b. You can also use the scroll bar at the right side of the window to scroll through the alphabetical list.
3. When the selected client is highlighted, you can double-click the name, press the right arrow key on your keyboard, or click the **Show Cases** button to view the client's cases.
4. Select a case by double-clicking a case title. You can also click the title once, then press the **Enter** key or click the **Select Case** button.
5. The program opens to the **General** form.

The **Equitable Distribution System** has five forms. You can click the following links to jump to help on the forms: **General** 133, **Property** 137, **After Tax Values** 139, **Pre-tax Statistics** 140 and **After Tax Statistics** 142. You can also scroll down to read the topics in the listed order.

Click the following links for other useful information in this section:

**Using Scenarios** 134

**Main Toolbar** 136

**Documents** 137 assembled with Equitable Distribution System data

# General Form

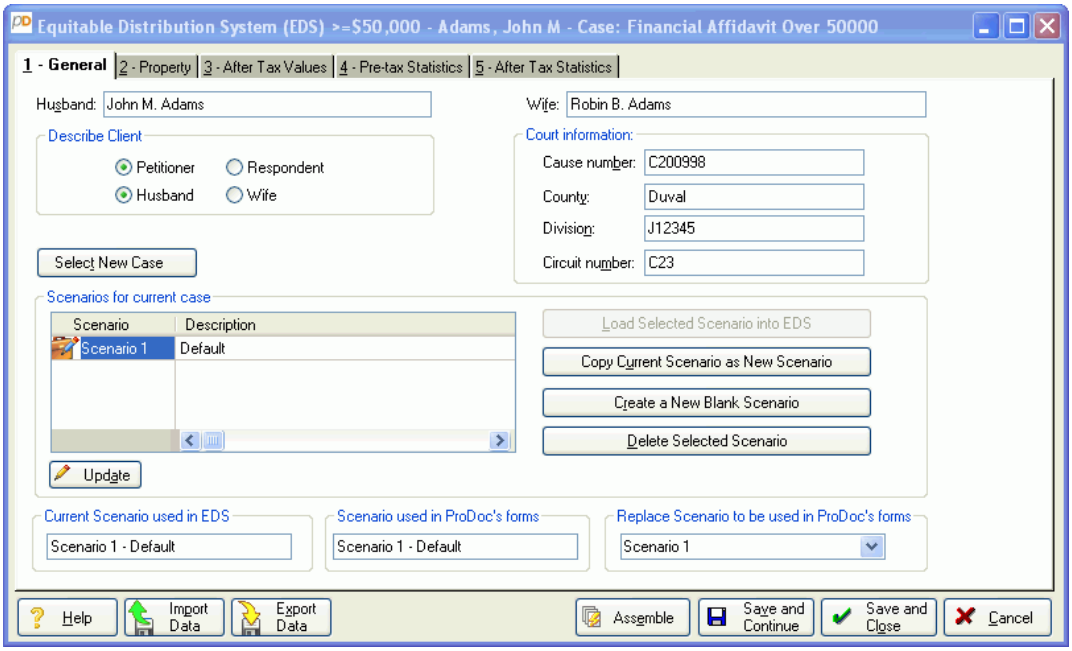



Figure 1, General Form

On the **General** form, enter the spouses' names, designate your client as the petitioner/respondent and husband/wife, and fill in the requested court information. You can also load, save, create and delete **scenarios** 134 on this form.

**Note:** Some of the forms in the **Family Law** library that are created with ProDoc use the information that you enter on this form.

To complete the fields on the **General** form:

1. Make sure that the correct client and case names appear at the top of the form.
2. If the wrong client and/or case appear, click the **Select New Case** button.
   a. The **Confirm** window appears.
      i. Click **Yes** if you want to save any changes to the current scenario before selecting a new client and case.
      ii. Click **No** if you do not want to save changes to the current scenario before selecting a new client and case.
      iii. Click **Cancel** if you want to return to the scenario that is currently loaded in the **Equitable Distribution System.**
   b. If you chose **Yes,** the **Select a Case** window opens.
   c. Highlight a client and case.
   d. Click **Select.**
3. Enter the name of the **Husband** and **Wife** in the fields provided.
4. In the **Describe Client** section:
   a. Designate whether your client is the **Petitioner** or **Respondent.**
   b. Designate whether your client is the **Husband** or **Wife.**

5. Provide the requested information in the **Court information** section.
   a. Enter the **Cause number.**
   b. Enter the **County.**
   c. Enter the **Division.**
   d. Enter the **Circuit Number.**

## Scenarios

The **Equitable Distribution System** allows you to create **scenarios.** Scenarios contain a list of the parties' property and how the property is to be divided. You can divide the property as you want and save each division as a scenario. In fact, creating multiple scenarios for your divorce cases can be a useful negotiating tool. Scenarios can help you compare what the parties want and what the judge is likely to order. Scenarios help you get a better look at the big picture.

When creating multiple scenarios it is important to remember that the scenario on which you are working in the **Equitable Distribution System** is not necessarily the scenario that will be selected for assembling documents in ProDoc. This is because out of all of the scenarios you create to determine the best division of property, only one scenario is actually used to assemble documents for your client's case. There are fields on this form that allow you to see which scenario is being used by the **Equitable Distribution System** and which scenario will be used to assemble in ProDoc. Before assembling documents in ProDoc that use information from the **Equitable Distribution System,** you should make sure that the correct scenario is displayed in the **Scenario Used in ProDoc's Forms** field to make sure that the correct information appears in your documents.

You may load, copy, create and delete scenarios using the buttons to the right of the **Scenarios for Current Case** window, which lists previously created scenarios. If there is an icon to the left of a scenario's name, it means that it is currently loaded for use in the **Equitable Distribution System.**

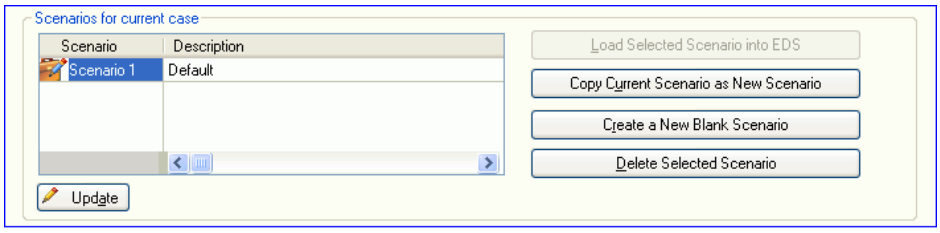



Figure 2, Scenarios Section of General Form

To load a scenario for use in the **Equitable Distribution System:**

1. Highlight the scenario you want to use from the list of scenarios in the **Scenarios for Current Case** section.
2. Click the **Load Selected Scenario into EDS** button.
3. The **Confirm** window appears and asks if you want to save the currently loaded scenario before loading the scenario you chose in Step 1.
   a. Click **Yes** if you want to save any changes you made to the currently loaded scenario.
   b. Click **No** if you do not want to save any changes you made to the currently loaded scenario.
4. The name of the scenario you have just loaded now appears in the **Current Scenario Used in EDS** field. At this point your scenario is loaded and is ready to be updated.

To copy the current scenario as a new scenario:

1. Click the **Copy Current Scenario as New Scenario** button.
2. The **Confirm** window appears and asks if you want to save any changes you made to the current scenario.
    a. Click **Yes** if you want to save any changes you made to the currently loaded scenario.
    b. Click **No** if you do not want to save any changes you made to the currently loaded scenario.
3. The **Create new scenario** window appears.
    a. Enter a name for the scenario in the **Scenario Name** field.
    b. Enter a description of the scenario in the **Scenario Description** field.
4. Click **OK.**

To create a new scenario:

1. Click the **Create a New Blank Scenario** button.
2. The **Confirm** window appears and asks if you want to save the scenario that is currently loaded in the **Equitable Distribution System.**
    a. Click **Yes** to save any changes you made to the currently loaded scenario.
        i. The **Create New Scenario** window appears.
        ii. Enter a scenario name and description.
        iii. Click **OK.**
        iv. You may now enter information for the scenario.
    b. Click **No** to discard changes you made to the currently loaded scenario.
        i. The **Create New Scenario** window appears.
        ii. Enter a scenario name and description.
        iii. Click **OK.**
        iv. You may now enter information for the scenario.
    c. Click **Cancel** to return to the **Equitable Distribution System** without creating a new scenario.

To delete a scenario:

1. Select a scenario from the list.
2. Click the **Delete Selected Scenario** button.
3. The **Confirm** window appears and asks if you want to delete the selected scenario.
4. Click **Yes** to delete the scenario.

**Note:** If the scenario you are deleting is the current scenario that is loaded in ProDoc, the **Select a ProDoc® Scenario** window appears. Click the drop down arrow, select another scenario to load in ProDoc and click **OK.**

If the scenario you are deleting is the only scenario for the selected client and case, the **Confirm** window appears. Click **Yes** to delete all of the answers except for the general information which includes which party is the petitioner and client, the names of the husband and wife and court information.

To change a scenario's name or description:

1. Select a scenario from the list.
2. Click the **Update** button.
3. The **Change Scenario Description** window appears.
4. Enter a new name and/or description for the scenario and click **OK.**

**Note:** You may also change a scenario's name or description by clicking the current name or description in the **Scenarios for Current Case** window and making the change directly in the field.

The information that you enter for a scenario may be used for document assembly in ProDoc, but the scenario must be loaded in ProDoc before it may be used. The three fields along the bottom of the **General** form show which scenarios are loaded in the **Equitable Distribution System** and ProDoc, and allow you to load a scenario for document assembly in ProDoc.

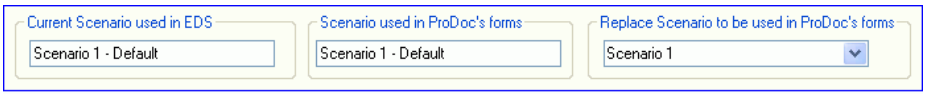

Current Scenario used in EDS
Scenario 1 - Default
Scenario used in ProDoc's forms
Scenario 1 - Default
Replace Scenario to be used in ProDoc's forms
Scenario 1

Figure 3, Scenarios Used Fields

The scenarios in the **Current Scenario Used in EDS** and the **Scenario Used in ProDoc's forms** fields may be different because the scenario on which you are working in the **Equitable Distribution System** is not necessarily the scenario that you will use when creating documents in ProDoc.

The scenario that is shown in the **Current Scenario Used in EDS** field is the scenario that is currently loaded for use in the **Equitable Distribution System** PowerPack. This is the scenario to which you can make changes in the **Equitable Distribution System.** You may change this scenario by highlighting a scenario in the **Scenarios for Current Case** list and clicking the **Load Selected Scenario into EDS** button.

The scenario that is shown in the **Scenario Used in ProDoc's Forms** field is the scenario that ProDoc will use to create documents. This scenario is used for the actual document assembly in ProDoc. You may change this scenario by clicking the drop-down arrow to the right of the **Replace Scenario to be Used in ProDoc's Forms** field and choosing the scenario that you want to use to assemble documents in ProDoc. If you change the scenario, the **Save and Continue** button must be clicked before the new scenario is activated in ProDoc.

## Main Toolbar

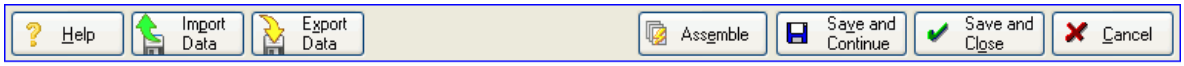



Figure 4, Toolbar

The toolbar along the bottom of the **Equitable Distribution System** consists of the **Help, Import Data, Export Data, Assemble, Save and Continue, Save and Close** and **Cancel** buttons. The buttons and their actions are discussed below.

**Help** – Click this button to call up the help topic for the form you are viewing.

**Import Data** – Click this button to import **Equitable Distribution System** data from a backup file into the **Equitable Distribution System.**

**Export Data** – Click this button to export data from the **Equitable Distribution System** to a diskette or other preferred form of media.

**Assemble** – Click this button to save your data and start a document assembly session.

**Save and Continue** – Click this button to save the data that has been entered into the **Equitable Distribution System** and continue working with the program.

**Save and Close** – Click this button to save the data that has been entered into the **Equitable Distribution System** and exit the program.

**Cancel** – Click this button to exit the **Equitable Distribution System** without saving the information that you entered during the current session.

### List of Documents Assembled

The documents that can be assembled using information from the **Equitable Distribution System** are:

| | |
|---|---|
| 3-700 | Marital Settlement Agreement, with children (FN01010) |
| 3-701 | Marital Settlement Agreement, no children (FN02010) |
| 3-800 | Final Judgment of Dissolution, with children (FN01011) |
| 3-801 | Final Judgment of Dissolution, no children (FN02011) |
| 8-500 | Final Judgment, with children (W8500) |
| 8-501 | Final Judgment, no children (W8501) |

## Property Form

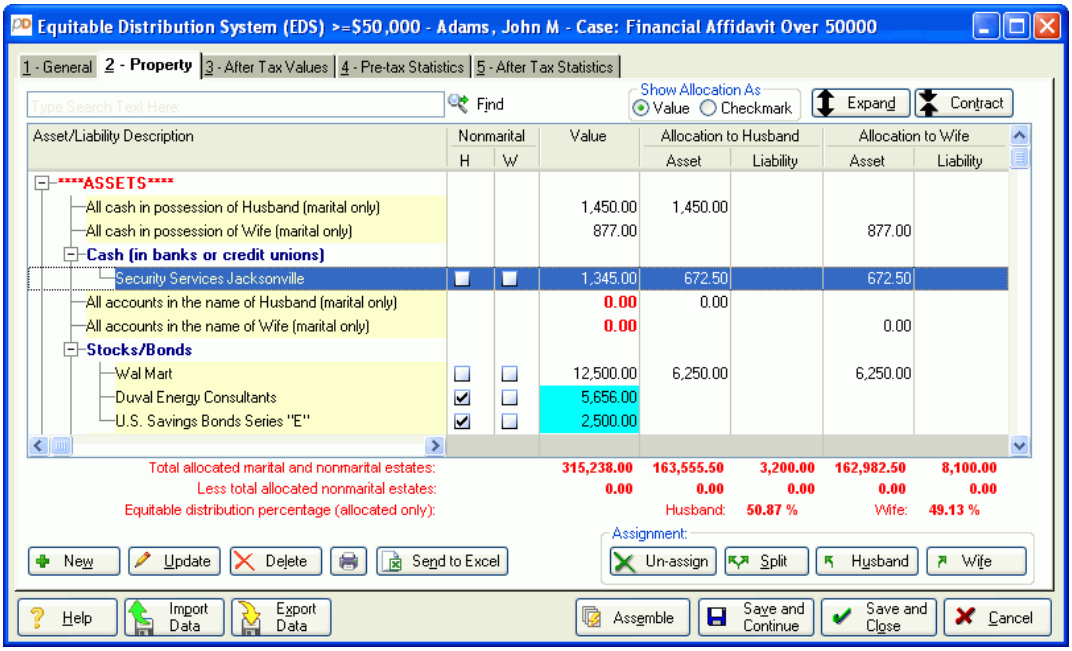



Figure 5, Property Form

The **Property** form allows you to enter marital and nonmarital property, the value of the property, and the spouse(s) to whom the property is allocated. To enter property on this form, highlight an asset or liability description and click **New.** The **Record Will Be Added** window appears that has fields for the asset or liability you are recording. Complete the fields and click **OK.** You may change an entry by highlighting it and clicking **Update.** To delete an entry, highlight it and click **Delete.**

You may locate asset or liability descriptions by entering a search word or phrase in the blank field above the **Asset/Liability Description** columns and clicking **Find.** The first description that meets your search criteria will be highlighted. If the asset or liability description is not the one for which you are searching, click **Find** until the description for which you are searching is located. When the search comes to the last item that it found, it will stay on that item when you click **Find.**

**Note:** Searches start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset/Liability Description** list.

There are two views on the **Property** form from which you may choose: value and checkmark. The view that you choose determines how allocations appear on the **Property** form and the different reports that you may print.

To view the dollar amounts of the property that is allocated to each spouse, select **Value** in the **Show Allocation As** section. If you select **Checkmark** in the **Show Allocation As** section, the **Property** form displays checkmarks that designate whether an asset or liability has been allocated to a spouse, or divided between the spouses.

To view all asset and liability descriptions in the **Asset/Liability Description** section, click the **Expand** button. To view only the main titles of the category groups within the **Asset/Liability Description** section, click the **Contract** button.

The **Total allocated marital and nonmarital estates, Less total allocated Nonmarital Estates** and **Equitable distribution percentage (allocated only)** amounts appear in red beneath the list of assets and liabilities. When viewing the allocations as checkmarks, the **Equitable distribution percentage (allocated only)** does not display in this section.

**Property Form Toolbar**

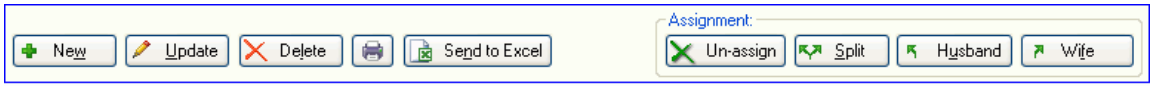



Figure 6, Property Form Toolbar

The **Property** form has a toolbar that appears only on that form. The toolbar consists of buttons that allow you to perform tasks needed to complete the **Equitable Distribution System.** These buttons are described below.

**New** – Add description and value of an asset or liability to the **Equitable Distribution System.**

**Update –** Modify a highlighted asset or liability.

**Delete** – Remove a highlighted asset or liability.

**Print** – View or print the **Equitable Distribution System Summary Sheet.**

**Send to Excel** – Send data from the Property form to an Excel spreadsheet.

**Un-assign** – Remove an allocation to the husband and/or wife for the highlighted asset or liability.

**Split** – Divide the highlighted asset or liability between the spouses.

**Husband –** Allots the highlighted asset or liability entirely to the husband.

**Wife** – Allots the highlighted asset or liability entirely to the wife.

## After Tax Values Form

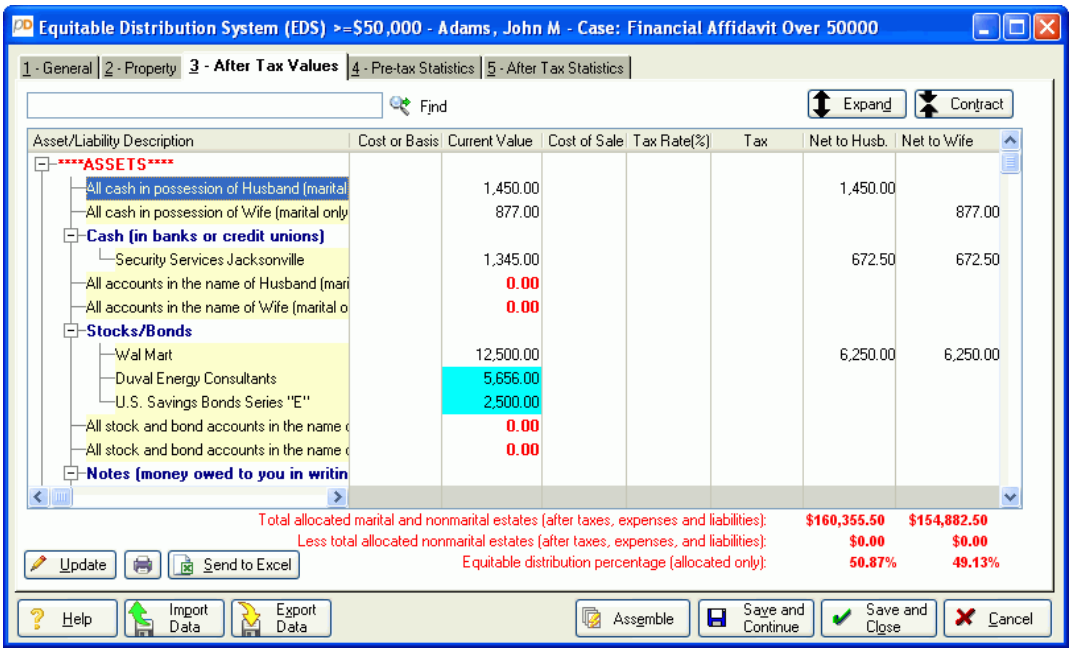



Figure 7, After Tax Values Form

The **After Tax Values** form allows users to enter amounts for the **Cost or Basis, Cost of Sale** and **Tax Rate,** calculates tax amounts and displays net values after taxes. Amounts on this form are categorized as **Cost or Basis, Current Value, Cost of Sale, Tax Rate (%), Tax, Net to Husb.** and **Net to Wife.**

You may locate asset or liability descriptions by entering a search word or phrase in the blank field above the **Asset/Liability Description** window and clicking **Find.** The first description that meets your search criteria will be highlighted. If the asset or liability description is not the one for which you are searching, click **Find** until the description for which you are searching is located. When the search comes to the last item that it found, it will stay on that item when you click **Find**.

> **Note:** Searches start from the point at which the cursor is positioned. If you want to search from the beginning, you should place the cursor at the top of the **Asset/Liability Description** list.

Click the **Expand** button to view all of the asset and liability descriptions in the **Asset/Liability Description** window. Click the **Contract** button to view only the **ASSETS** and **LIABILITIES** titles. From the contracted view, you may click the plus signs that appear to the left of the categories to locate the asset or liability description that you want to complete or update.

There are three sums in red along the bottom of the form that are displayed as amounts that are the husband's and wife's. The sums are the **Total allocated marital and nonmarital estates (after taxes, expenses and liabilities), Less total allocated nonmarital estates (after taxes, expenses and liabilities)** and **Equitable distribution percentage (allocated only).**

There is a small toolbar on this form. The buttons are **Update, Print** and **Send to Excel.**

**Update** – Modify a highlighted asset or liability.

**Print** – View or print the **Equitable Distribution System Marital Net Value Summary Sheet.**

**Send to Excel** – Send data from the **After tax values** form to an Excel spreadsheet.

To enter the **Cost or Basis**, **Cost of Sale** and **Tax Rate** of an asset:

1. Highlight an asset and click the **Update** button.
2. The **Change the cost and tax rate** window appears.
3. Enter the **Cost or Basis**, **Cost of Sale** and **Tax Rate (%)** amounts.
   a. If this is a principal residence, enter the **Principal Residence Exclusion** amount and press **Tab** on your keyboard. This causes a **Depreciation** button to appear.
   b. If you have depreciation you want to claim, click the **Depreciation** button.
      i. The **Depreciation Recapture** window appears.
      ii. Enter the depreciation that was claimed after May 6, 1997.
      iii. Click **OK.**
4. Click **OK.**

**Note:** You also may enter amounts directly on the form, by clicking an asset's **Cost or Basis, Cost of Sale** or **Tax Rate (%)** column and entering the amount.

## Pre-tax Statistics Form

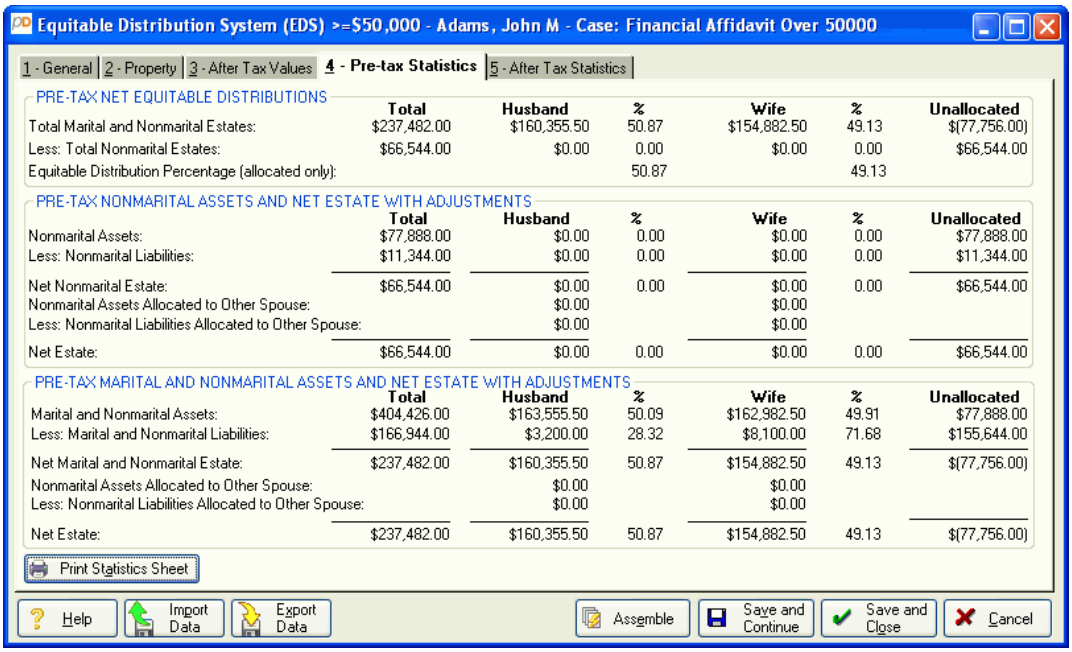

Equitable Distribution System (EDS) >=$50,000 - Adams, John M - Case: Financial Affidavit Over 50000
1 - General
2 - Property
3 - After Tax Values
4 - Pre-tax Statistics
5 - After Tax Statistics
PRE-TAX NET EQUITABLE DISTRIBUTIONS
Total Husband % Wife % Unallocated
Total Marital and Nonmarital Estates: $237,482.00 $160,355.50 50.87 $154,882.50 49.13 $(77,756.00)
Less: Total Nonmarital Estates: $66,544.00 $0.00 0.00 $0.00 0.00 $66,544.00
Equitable Distribution Percentage (allocated only): 50.87 49.13
PRE-TAX NONMARITAL ASSETS AND NET ESTATE WITH ADJUSTMENTS
Total Husband % Wife % Unallocated
Nonmarital Assets: $77,888.00 $0.00 0.00 $0.00 0.00 $77,888.00
Less: Nonmarital Liabilities: $11,344.00 $0.00 0.00 $0.00 0.00 $11,344.00
Net Nonmarital Estate: $66,544.00 $0.00 0.00 $0.00 0.00 $66,544.00
Nonmarital Assets Allocated to Other Spouse: $0.00 $0.00
Less: Nonmarital Liabilities Allocated to Other Spouse: $0.00 $0.00
Net Estate: $66,544.00 $0.00 0.00 $0.00 0.00 $66,544.00
PRE-TAX MARITAL AND NONMARITAL ASSETS AND NET ESTATE WITH ADJUSTMENTS
Total Husband % Wife % Unallocated
Marital and Nonmarital Assets: $404,426.00 $163,555.50 50.09 $162,982.50 49.91 $77,888.00
Less: Marital and Nonmarital Liabilities: $166,944.00 $3,200.00 28.32 $8,100.00 71.68 $155,644.00
Net Marital and Nonmarital Estate: $237,482.00 $160,355.50 50.87 $154,882.50 49.13 $(77,756.00)
Nonmarital Assets Allocated to Other Spouse: $0.00 $0.00
Less: Nonmarital Liabilities Allocated to Other Spouse: $0.00 $0.00
Net Estate: $237,482.00 $160,355.50 50.87 $154,882.50 49.13 $(77,756.00)
Print Statistics Sheet
Help
Import Data
Export Data
Assemble
Save and Continue
Save and Close
Cancel

Figure 8, Pre-tax Statistics Form

The **Pre-tax Statistics** form displays marital and nonmarital assets and liabilities, and net estate amounts before taxes have been deducted. The form is divided into **Pre-tax Net Equitable Distributions, Pre-tax Nonmarital Assets and Net Estate With Adjustments** and **Pre-tax Marital and Nonmarital Assets and Net Estate With Adjustments** sections. The amounts that display in each section are listed below.

The **Pre-tax Net Equitable Distributions** section displays pre-tax amounts for:

**Total Marital and Nonmarital Estates,**

**Less: Total Nonmarital Estates,** and the

**Equitable Distribution Percentage (Allocated Only).**

The **Pre-tax Nonmarital Assets and Net Estate With Adjustments** section displays pre-tax amounts for:

**Nonmarital Assets,**

**Less: Nonmarital Liabilities,**

**Net Nonmarital Estate,**

**Nonmarital Assets Allocated to Other Spouses,**

**Less: Nonmarital Liabilities Allocated to Other Spouse,** and the

**Net Estate.**

The **Pre-tax Marital and Nonmarital Assets and Net Estate With Adjustments** section displays pre-tax amounts for**:**

**Marital and Nonmarital Assets,**

**Less: Marital and Nonmarital Liabilities,**

**Net Marital and Nonmarital Estate,**

**Nonmarital Assets Allocated to Other Spouse,**

**Less: Nonmarital Liabilities Allocated to Other Spouse** and the

**Net Estate.**

The totals in each section are further broken down to show the amounts allocated to the husband and wife, and the amounts that have not been allocated. The amounts that have been allocated to the husband and wife are also shown as percentages.

To print statistics sheets:

1. Click the **Print Statistics Sheet** button.
2. A list appears with the selections **Print this sheet, Print after tax sheet** or **Print both pre-tax and after tax sheets.**
3. Select the statistics sheet(s) you want to print from the list.
4. The **Preview** window appears and asks if you want to review the report.
   a. Click **Yes** if you want to review the statistics sheet before printing it.
   b. Click **No** if you want to print the statistics sheet without reviewing it.
   c. Click **Cancel** if you do not want to view or print the statistics sheet.

# After Tax Statistics Form

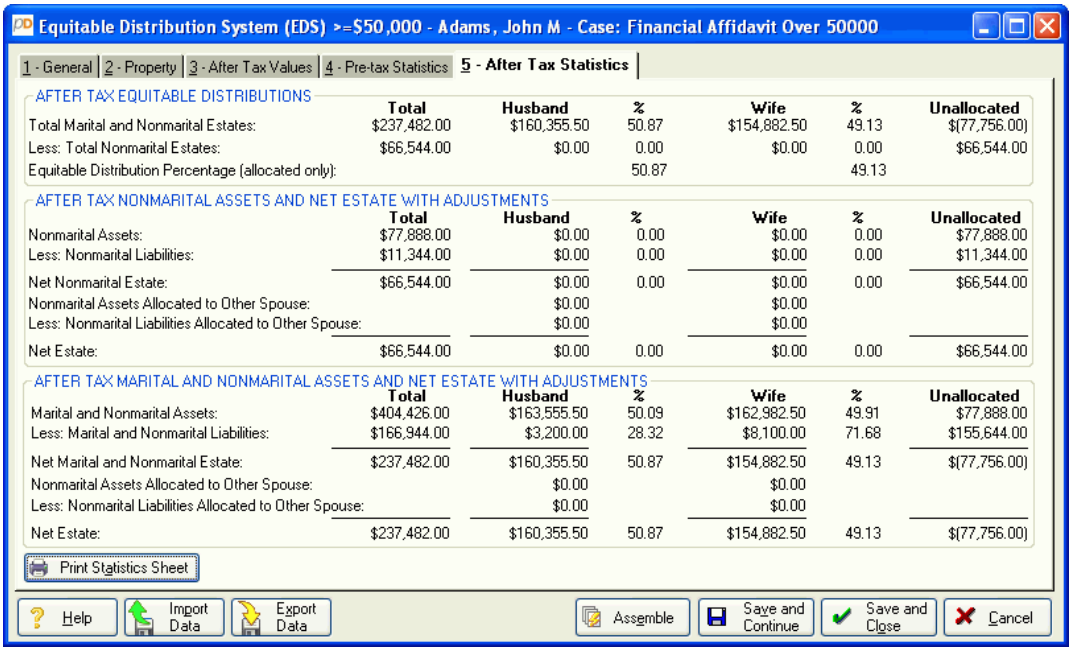

Equitable Distribution System (EDS) >=$50,000 - Adams, John M - Case: Financial Affidavit Over 50000
1 - General
2 - Property
3 - After Tax Values
4 - Pre-tax Statistics
5 - After Tax Statistics
AFTER TAX EQUITABLE DISTRIBUTIONS
Total Husband % Wife % Unallocated
Total Marital and Nonmarital Estates: $237,482.00 $160,355.50 50.87 $154,882.50 49.13 $(77,756.00)
Less: Total Nonmarital Estates: $66,544.00 $0.00 0.00 $0.00 0.00 $66,544.00
Equitable Distribution Percentage (allocated only): 50.87 49.13
AFTER TAX NONMARITAL ASSETS AND NET ESTATE WITH ADJUSTMENTS
Total Husband % Wife % Unallocated
Nonmarital Assets: $77,888.00 $0.00 0.00 $0.00 0.00 $77,888.00
Less: Nonmarital Liabilities: $11,344.00 $0.00 0.00 $0.00 0.00 $11,344.00
Net Nonmarital Estate: $66,544.00 $0.00 0.00 $0.00 0.00 $66,544.00
Nonmarital Assets Allocated to Other Spouse: $0.00 $0.00
Less: Nonmarital Liabilities Allocated to Other Spouse: $0.00 $0.00
Net Estate: $66,544.00 $0.00 0.00 $0.00 0.00 $66,544.00
AFTER TAX MARITAL AND NONMARITAL ASSETS AND NET ESTATE WITH ADJUSTMENTS
Total Husband % Wife % Unallocated
Marital and Nonmarital Assets: $404,426.00 $163,555.50 50.09 $162,982.50 49.91 $77,888.00
Less: Marital and Nonmarital Liabilities: $166,944.00 $3,200.00 28.32 $8,100.00 71.68 $155,644.00
Net Marital and Nonmarital Estate: $237,482.00 $160,355.50 50.87 $154,882.50 49.13 $(77,756.00)
Nonmarital Assets Allocated to Other Spouse: $0.00 $0.00
Less: Nonmarital Liabilities Allocated to Other Spouse: $0.00 $0.00
Net Estate: $237,482.00 $160,355.50 50.87 $154,882.50 49.13 $(77,756.00)
Print Statistics Sheet
Help
Import Data
Export Data
Assemble
Save and Continue
Save and Close
Cancel

Figure 9, After Tax Statistics Form

The **After Tax Statistics** form displays marital and nonmarital assets and liabilities, and net estate amounts after taxes have been deducted. The form is divided into **After Tax Equitable Distributions, After Tax Nonmarital Assets and Net Estate With Adjustments** and **After Tax Marital and Nonmarital Assets and Net Estate With Adjustments** sections. The amount categories that display in each section are listed below.

The **After Tax Equitable Distributions** section displays after tax amounts for:

**Total Marital and Nonmarital Estates,**

**Less: Total Nonmarital Estates** and the

**Equitable Distribution Percentage (Allocated Only).**

The **After Tax Nonmarital Assets and Net Estate With Adjustments** section displays after tax amounts for:

**Nonmarital Assets,**

**Less: Nonmarital Liabilities,**

**Net Marital and Nonmarital Estate,**

**Nonmarital Assets Allocated to Other Spouse,**

**Less: Nonmarital Liabilities Allocated to Other Spouse,** and the

**Net Estate.**

The **After Tax Marital and Nonmarital Assets and Net Estate With Adjustments** section displays after tax amounts for:

**Marital and Nonmarital Assets,**

**Less: Marital and Nonmarital Liabilities,**

**Net Marital and Nonmarital Estate,**

**Nonmarital Assets Allocated to Other Spouse,**

**Less: Nonmarital Liabilities Allocated to Other Spouse,** and the

**Net Estate.**

These totals are further broken down to show the amounts allocated to the husband and wife, and the amounts that have not been allocated. The amounts that have been allocated to the husband and wife are also shown as percentages.

To print statistics sheets:

1. Click the **Print Statistics Sheet** button.
2. A list appears with the selections **Print this sheet, Print after tax sheet** or **Print both pre-tax and after tax sheets.**
3. Select the statistics sheet(s) you want to print from the list.
4. The **Preview** window appears and asks if you want to review the report.
   a. Click **Yes** if you want to review the statistics sheet before printing it.
   b. Click **No** if you want to print the statistics sheet without reviewing it.
   c. Click **Cancel** if you do not want to view or print the statistics sheet.

# Financial Affidavit (<$50,000)

The **Family Law Financial Affidavit Under $50,000** allows you to:

- Prepare a financial affidavit for clients whose annual income is under $50,000;
- Print a detailed statistics sheet;
- Print a financial affidavit.

**Opening the Financial Affidavit (<$50,000)**

1. On ProDoc's main menu, click **PowerPacks → Family Law → Financial Affidavit (<$50,000).**

2. The **Select a Case** window appears. To find the client you want to use:
   a. Type the first few letters of the client's last name. As you type, the highlight will move to the next match on the client list. To start over, press the **Backspace** key on your keyboard.
   b. You can also use the scroll bar at the right side of the window to scroll through the alphabetical list.
3. When the selected client is highlighted, you can double-click the name, press the right arrow key on your keyboard, or click the **Show Cases** button to view the client's cases.
4. Select a case by double-clicking a case title. You can also click the title once, then press the **Enter** key or click the **Select Case** button.
5. The program opens to the **Caption** form.

**Navigating the Financial Affidavit**

There are 11 tabs across the top of the **Financial Affidavit,** starting with **Caption** and ending with **Statistics.** Each tab represents a different form of the **Financial Affidavit.** To move from one form to another, position the cursor over the tab you want to use and click it. You may also press **ALT** + the desired form's underlined character (Note: if you are pressing **ALT** + the form's underlined number, use the numbers on top row of the keyboard, pressing **Num Lock** and using the numbers on the keypad will not work). You will be shown the form for the tab's underlined character that you choose.

There are multiple fields to complete on each form of the **Financial Affidavit.** To navigate from one field to another you may click the field you would like to use, or you may press the Tab key on your keyboard to move forward, and the combination of the Shift and Tab keys to move backwards through the fields.

**Completing the Affidavit**

You will need the following information:

**Caption Form** 146: (a) client's name, (b) other party's name, mailing address and fax number, (c) style, (d) circuit court number, (e) case number, (f) county, (g) division of the court, (h) whether this is a dissolution of marriage.

**General Information Form** 147: (a) whether person filing affidavit is Petitioner or Respondent, (b) sex, (c) client's employment status, (d) client's occupation, (e) unemployment description of efforts to find a job, how soon employment is expected and the pay rate expected (if not employed), (f) number of jobs, (g) description of current employers' names, addresses, telephone numbers and pay rates.

**Income Form** 148: (a) present monthly gross income, (b) present monthly deductions.

**Taxes Form**[150]: (a) client's income tax filing status, (b) number of dependents claimed, (c) whether you want to manually enter monthly federal income taxes, FICA taxes and Medicare taxes or use the **Tax Calculator** to determine the amounts.

**Expenses Form**[150]: (a) household expenses, (b) automobile expenses, (c) monthly expenses for children common to both parties, (d) monthly insurance, (e) other monthly expenses not otherwise listed, (f) monthly payment to creditors (only for payments made by you on an outstanding balance).

**Assets Form**[151]: (a) cash (on hand), (b) cash (in banks or credit unions), (c) stocks/bonds, (d) notes, (e) real estate (home), (f) real estate (other), (g) automobiles, (h) other personal property, (i) retirement plans (profit sharing, pension, IRA, 401(k)s, etc.), (j) other assets.

**Liabilities Form**[152]: (a) mortgages on real estate (home), (b) mortgages on real estate (other), (c) auto loans, (d) charge/credit card accounts, (e) other liabilities.

**Contingent Assets Form**[153]: contingent assets the filer is requesting the judge award him/her.

**Contingent Liabilities Form**[154]: contingent liabilities for which the filer is responsible.

**Finish Form**[155]: (a) whether a certificate of service will be served, (b) certificate of service (how served and date of service), (c) whether other party is represented by an attorney and the attorney's name and mailing address, (d) client's attorney name, (e) whether a Child Support Guidelines Worksheet will be filed in this case.

**Statistics Form**[156]: This is a printable statistics worksheet that provides an overview of the client's monthly net income, total monthly expenses, net worth, and determines if there is a surplus or deficit regarding monthly income.
If you are preparing the financial affidavit for dissolution of marriage, the statistics worksheet also lists assets, liabilities, and contingent assets and liabilities that the filer is requesting, or that are considered non-marital property.

**Financial Affidavit for Family Law Matters Other Than Dissolution of Marriage**

The **Financial Affidavit** must be filed in other family law cases, **except** simplified dissolutions of marriage, enforcement proceedings, contempt proceedings, adoptions, and proceedings for injunctions for domestic or repeat violence. The difference when using a **Financial Affidavit** for matters other than Dissolutions of Marriage is that you do not need to identify whether assets, liabilities, and contingent assets and liabilities are being requested by the filer, and whether they are non-marital property.

## Toolbar

Figure 1, Toolbar

**New / Delete -** These buttons appear on the forms for tabs **Income** and tabs **Expenses** through **Contingent Liabilities**. Clicking the **New** button will add blank lines to the field highlighted, so you may input items not included. Clicking the **Delete** button will remove any lines that you have highlighted.

**Help -** Clicking the **Help** button will take you to the help menu.

**Assemble -** Clicking the **Assemble** button closes the **Financial Affidavit's** window and opens the **Starting Document Assembly** window. From this window you may start a document assembly session for a client. You may save time by unchecking the **Review prior answers** box (this allows you to assemble a document without having to review answers that have been input previously).

**Print -** Clicking the **Print** button opens a window that asks if you would like to preview the report. Clicking **No** will start the print job. If you click **Yes,** the report will display on the screen and you are given the opportunity to print or exit after previewing the report. Clicking **Cancel** will allow you to remain in the **Financial Affidavit.**

**Save and Continue -** Clicking this button will save any changes you have made to the file.

**Save and Close -** Clicking the **Save and Close** button will close the **Financial Affidavit** window and save any changes you have made to the file. When you return to your client's case, the **Financial Affidavit** will reflect all changes made before you saved the document.

**Cancel -** Clicking the **Cancel** button will display a prompt that asks if you would like to exit without saving. If you click **No,** you will be returned to the **Financial Affidavit** form to finish inputting data. If you click **Yes,** your answers will not be saved and you will exit to the ProDoc Main Menu.

> **Note:** If you click the **X** button in the upper right hand corner of the screen, you will exit ProDoc without saving any of the work that you performed. To save your work, always use the **Save and Continue** and **Save and Close** buttons.

## Caption Form

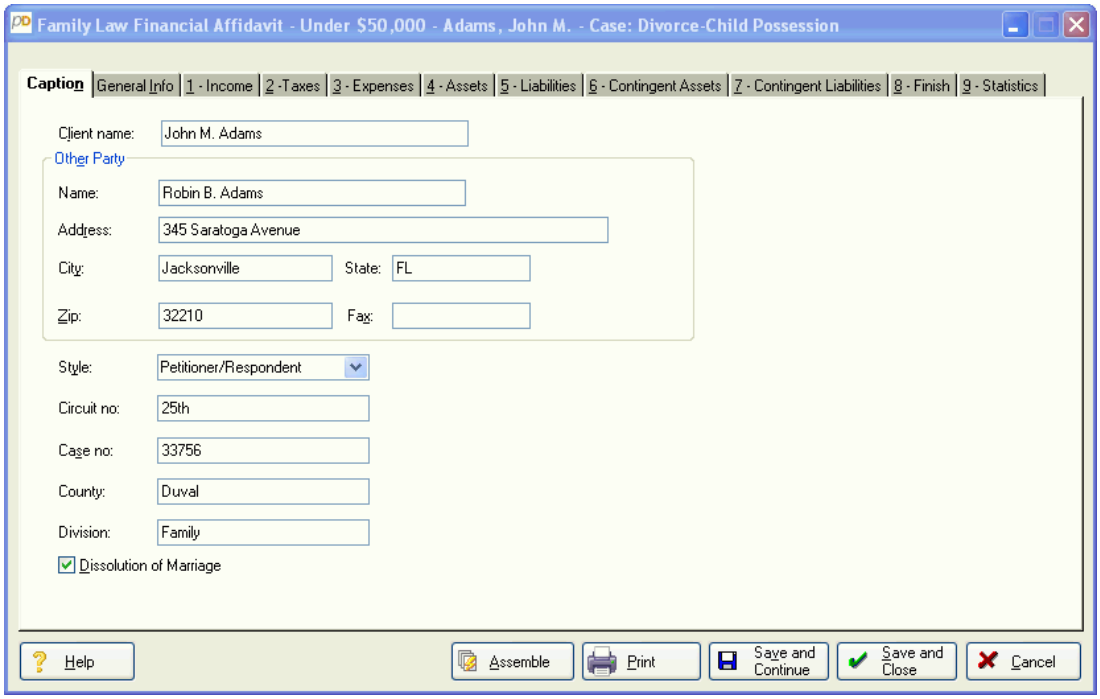



Figure 2, Caption Form

The information requested on the **Caption** form includes the client's name, other party's name, mailing address and fax number, style, circuit court number, case number, county, division of the court, and whether this is a dissolution of marriage.

Placing a check in the **Dissolution of Marriage** box will add columns for **H** (husband) and **W** (wife) to the right of the value box and a column to the left of the item box in the **Assets, Liabilities, Contingent Assets,** and **Contingent Liabilities** forms. Placing a check in the **H** or **W** box distinguishes that item as the non-marital property or debt of the husband or wife. Check the box to the left of the value box if the filer is requesting to be awarded an asset or is taking responsibility for a debt.

# General Information Form

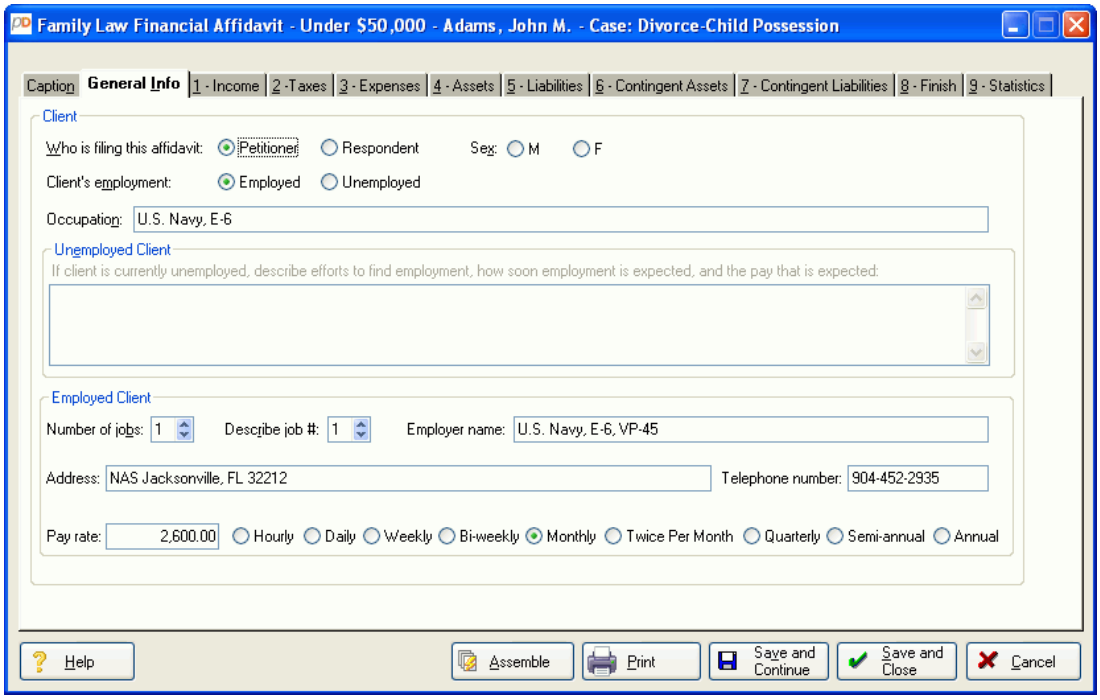



Figure 3, General Information Form

To complete the **General Information** form of the Financial Affidavit, you will need the following information:

**General Information:** (a) whether person filing affidavit is Petitioner or Respondent, (b) sex, (c) client's employment status, (d) client's occupation, (e) unemployment description of efforts to find a job, how soon employment is expected and the pay rate expected (if not employed), (f) number of jobs, (g) description of current employers' names, addresses, telephone numbers and pay rates.

**Client's Employment**

1. If you check **Employed,** you must provide a description of your client's occupation, number of jobs currently held, a description of each job (toggle between jobs by clicking the up or down arrow in the **Describe Job #** box) including the employers' name, address, and telephone number.

   a. You will also need to input your client's pay rate and how often he or she is paid. The pay rate is defaulted to **Monthly**. If your client is paid on a basis other than monthly, make sure to check the appropriate circle.

   b. The pay rate must appear as a monthly figure on the **Financial Affidavit.** ProDoc automatically converts the pay rate you enter to a monthly figure.

2. If you check **Unemployed,** you must provide an explanation of your client's efforts to find a job, when your client expects to become employed, and the pay rate he or she expects to receive.

# Income Form

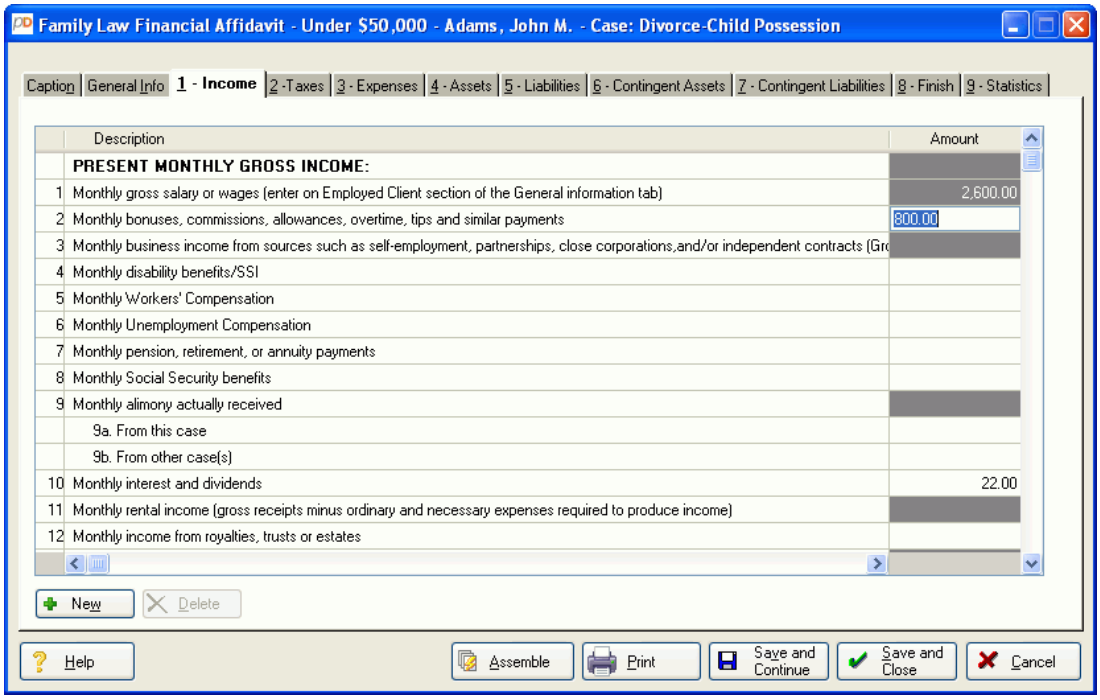

Family Law Financial Affidavit - Under $50,000 - Adams, John M. - Case: Divorce-Child Possession
Caption
General Info
1 - Income
2 -Taxes
3 - Expenses
4 - Assets
5 - Liabilities
6 - Contingent Assets
7 - Contingent Liabilities
8 - Finish
9 - Statistics
Description
Amount
PRESENT MONTHLY GROSS INCOME:
1 Monthly gross salary or wages (enter on Employed Client section of the General information tab) 2,600.00
2 Monthly bonuses, commissions, allowances, overtime, tips and similar payments 800.00
3 Monthly business income from sources such as self-employment, partnerships, close corporations,and/or independent contracts (Gr
4 Monthly disability benefits/SSI
5 Monthly Workers' Compensation
6 Monthly Unemployment Compensation
7 Monthly pension, retirement, or annuity payments
8 Monthly Social Security benefits
9 Monthly alimony actually received
9a. From this case
9b. From other case(s)
10 Monthly interest and dividends 22.00
11 Monthly rental income (gross receipts minus ordinary and necessary expenses required to produce income)
12 Monthly income from royalties, trusts or estates
New
Delete
Help
Assemble
Print
Save and Continue
Save and Close
Cancel

Figure 4, Income Form

**Income** must be input as monthly figures. Gross income should include, but is not limited to, the income and deductions that are listed on the **Income** form. You may add other sources of income or deductions on this form by highlighting the desired field and clicking the **New** button to insert extra lines for the other information.

Gross income shall include, but is not limited to, the following:

1. Salary or wages;
2. Bonuses, commissions, allowances, overtime, tips, and other similar payments;
3. Business income from sources such as self-employment, partnership, close corporations, and independent contracts, "Business income" means gross receipts minus ordinary and necessary expenses required to produce income;
4. Disability benefits;
5. Worker's compensation;
6. Unemployment compensation;
7. Pension, retirement or annuity payments;
8. Social security benefits;
9. Spousal support received from a previous marriage or court ordered in the marriage before the court;
10. Interest and dividends;
11. Rental income, which is gross receipts minus ordinary and necessary expenses required to produce the income;
12. Income from royalties, trusts or estates;
13. Reimbursed expenses or in kind payments to the extent that they reduce living expenses;

14. Gains derived from dealings in property, unless the gain is nonrecurring.

The following is a chart to help determine income as a monthly figure:

**Hourly** –

Hourly wage x Hours worked per week = Weekly income

Weekly income x 52 weeks per year = Yearly income

Yearly income / 12 = **Monthly Income**

**Daily** –

Daily income x Days worked per week = Weekly income

Weekly income x 52 weeks per year = Yearly income

Yearly income / 12 = **Monthly Income**

**Weekly** –

Weekly income x 52 weeks per year = Yearly income

Yearly income / 12 = **Monthly Income**

**Bi-weekly** –

Bi-weekly income x 26 = Yearly amount

Yearly income / 12 = **Monthly Income**

**Bi-monthly** –

Bi-monthly income x 2 = **Monthly Income**

Allowable deductions from gross income include:

1. Federal, state and local income tax deductions, adjusted for actual filing status and allowable dependents and income tax liabilities;
2. Federal insurance contributions or self-employment tax;
3. Monthly Medicare payments;
4. Mandatory union dues;
5. Mandatory retirement payments;
6. Health insurance payments, excluding payments for coverage of the minor child;
7. Court-ordered support for other children which is actually paid;
8. Spousal support paid pursuant to a court order from a previous marriage or the marriage before the court.

## Taxes Form

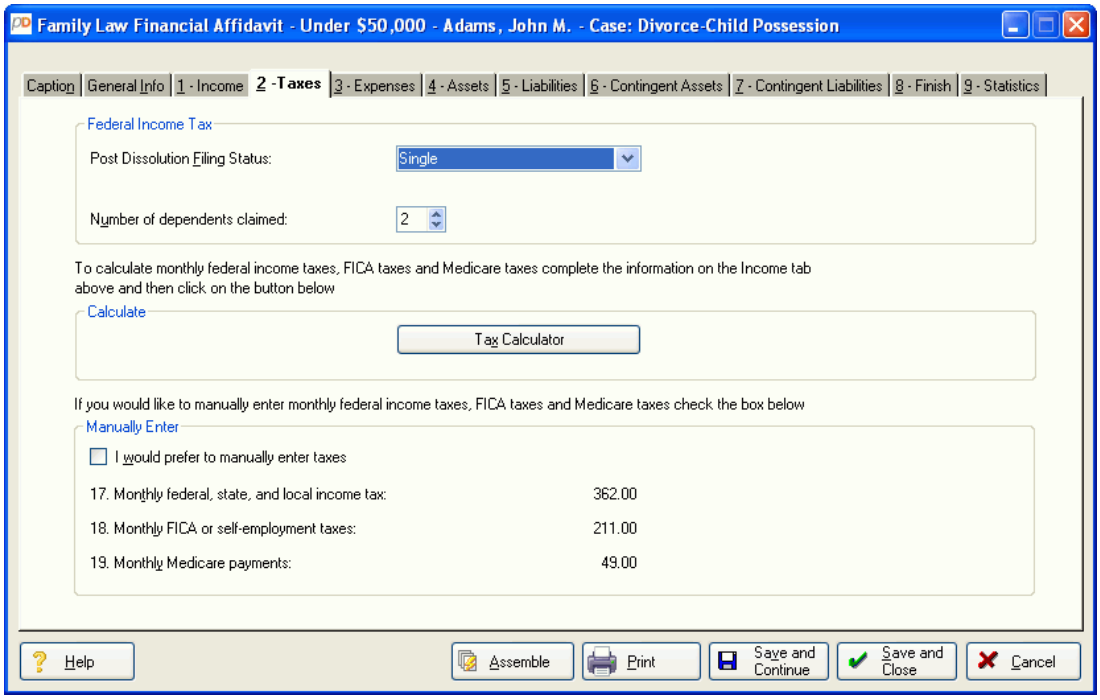

Family Law Financial Affidavit - Under $50,000 - Adams, John M. - Case: Divorce-Child Possession
Caption
General Info
1 - Income
2 -Taxes
3 - Expenses
4 - Assets
5 - Liabilities
6 - Contingent Assets
7 - Contingent Liabilities
8 - Finish
9 - Statistics
Federal Income Tax
Post Dissolution Filing Status:
Single
Number of dependents claimed:
2
To calculate monthly federal income taxes, FICA taxes and Medicare taxes complete the information on the Income tab above and then click on the button below
Calculate
Tax Calculator
If you would like to manually enter monthly federal income taxes, FICA taxes and Medicare taxes check the box below
Manually Enter
I would prefer to manually enter taxes
17. Monthly federal, state, and local income tax:
362.00
18. Monthly FICA or self-employment taxes:
211.00
19. Monthly Medicare payments:
49.00
Help
Assemble
Print
Save and Continue
Save and Close
Cancel

Figure 5, Taxes Form

Select the filer's filing status and number of dependents being claimed. You may manually enter the filer's federal income, FICA and Medicaid taxes or you may click the **Tax Calculator** button to automatically calculate these taxes. If you already made the calculations with the **Tax Calculator** when you completed the Child Support Guidelines, the amounts will appear in the fields automatically.

## Expenses Form

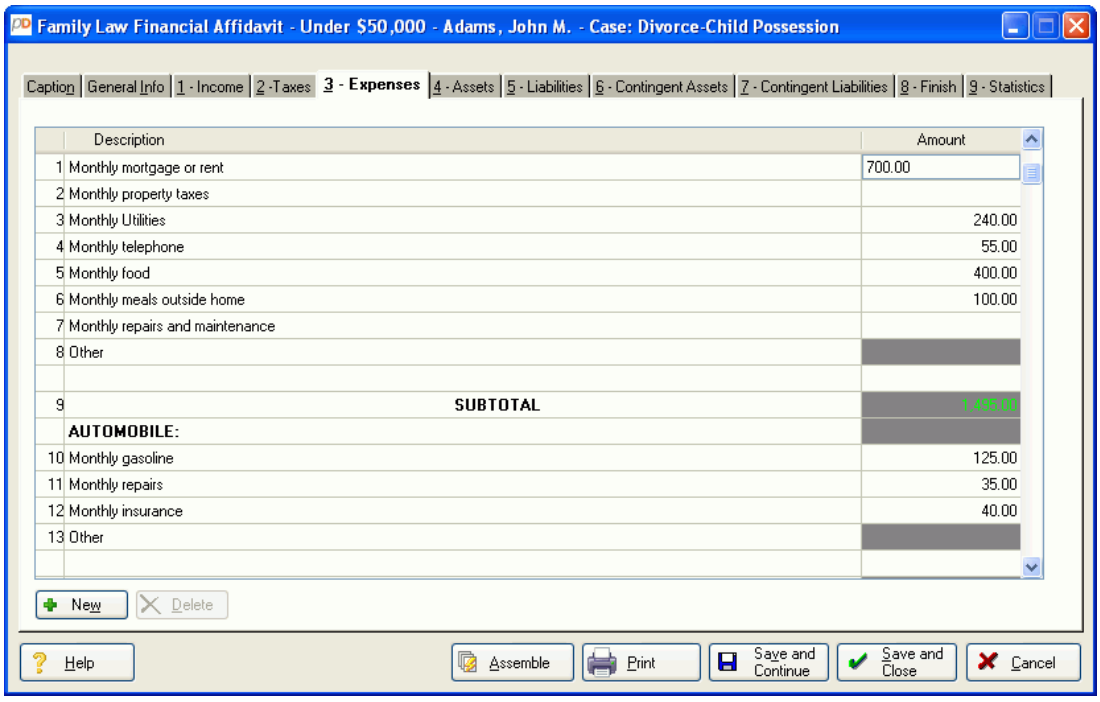



Figure 6, Expenses Form

**Expenses** must be input as monthly figures. If you need to convert your expenses to a monthly figure you may convert them using the same formulas provided in the **Income Form** 148 topic.

## Assets Form

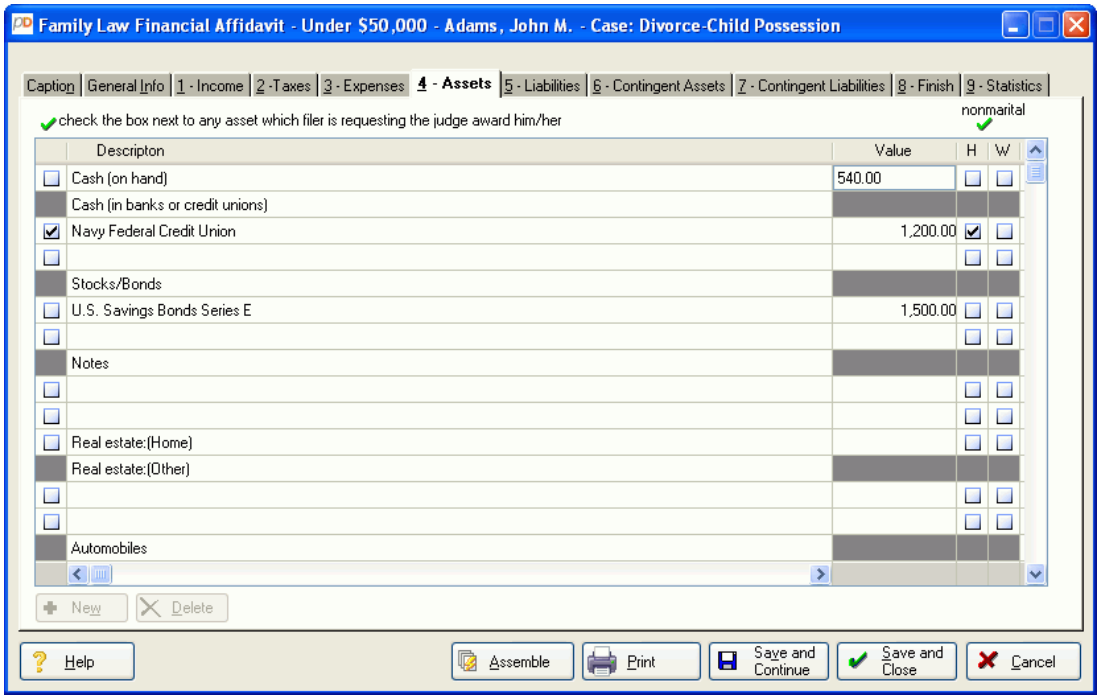



Figure 7, Assets Form

**Assets** is a list of all assets (property) owned by the filer, or between the couple (if a dissolution of marriage). It is important to place a value on all assets. If this is a **dissolution of marriage,** boxes will appear to the right and left of the **Description** and **Value** boxes. The box to the left of the **Description** box is to be checked if the filer requests the judge award the asset to him/her. The boxes to the right of **Value** indicate to whom you believe the asset(s) belong. Check the **H** (husband) or **W** (wife) box, if the asset(s) are non-marital, to indicate whose property you believe the asset to be.

# Liabilities Form

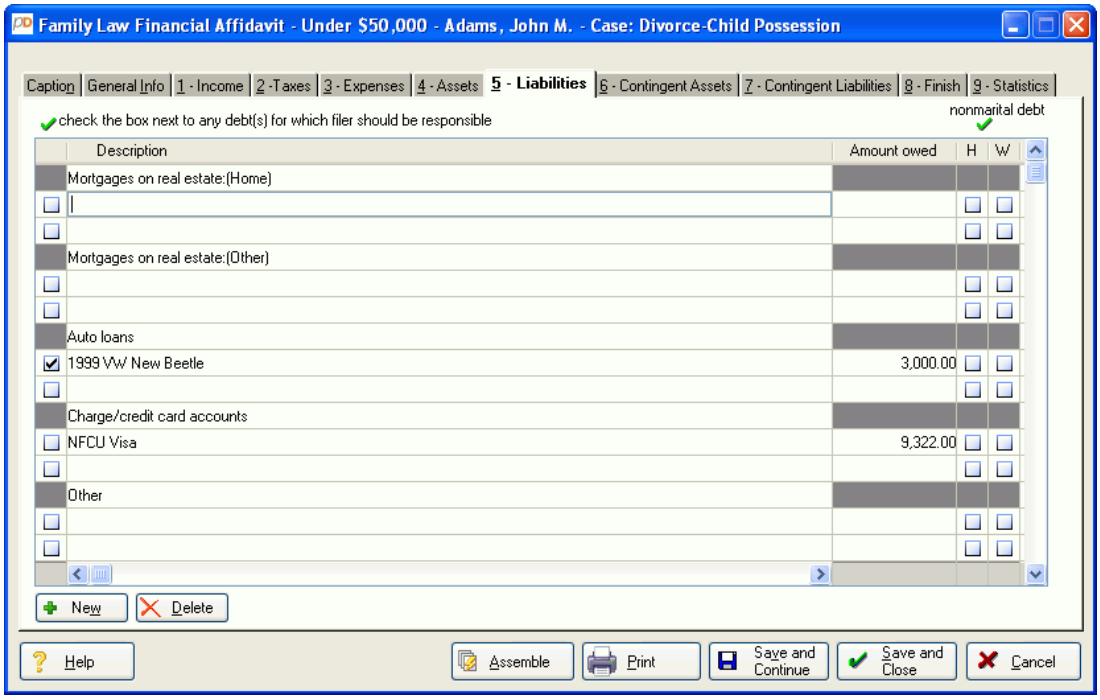



Figure 8, Liabilities Form

**Liabilities** is a list of all liabilities (debts) incurred by the filer, or between the couple (if a dissolution of marriage). It is important to place a value on all liabilities. If this is a **dissolution of marriage,** boxes will appear to the right and left of the **Description** and **Amount Owed** boxes. The box to the left of the **Description** box is to be checked if the filer should be responsible for the debt(s). The boxes to the right of **Amount Owed** indicate to whom you believe the debt(s) belong. Check the **H** (husband) or **W** (wife) box, if the debt(s) are non-marital, to indicate whose responsibility you believe the liability to be.

# Contingent Assets Form

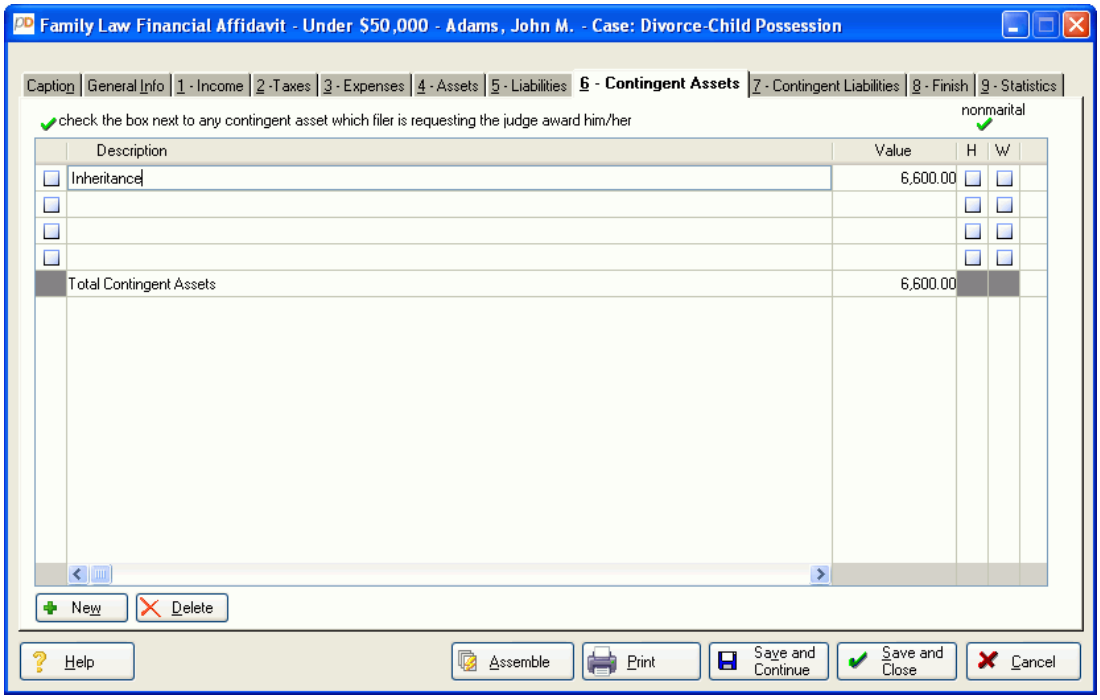



Figure 9, Contingent Assets Form

Examples of **Contingent Assets** include income potential, accrued vacation or sick leave, bonus, inheritance, etc. If the client has any possible assets, you must list them here. If this is a **dissolution of marriage,** boxes will appear to the right and left of the **Description** and **Value** boxes. The box to the left of the **Description** box is to be checked if the filer requests the judge award the contingent asset to him/her. The boxes to the right of **Value** indicate to whom you believe the item(s) belong. Check the **H** (husband) or **W** (wife) box, if the contingent asset(s) are non-marital, to indicate whose property you believe the asset to be.

# Contingent Liabilities Form

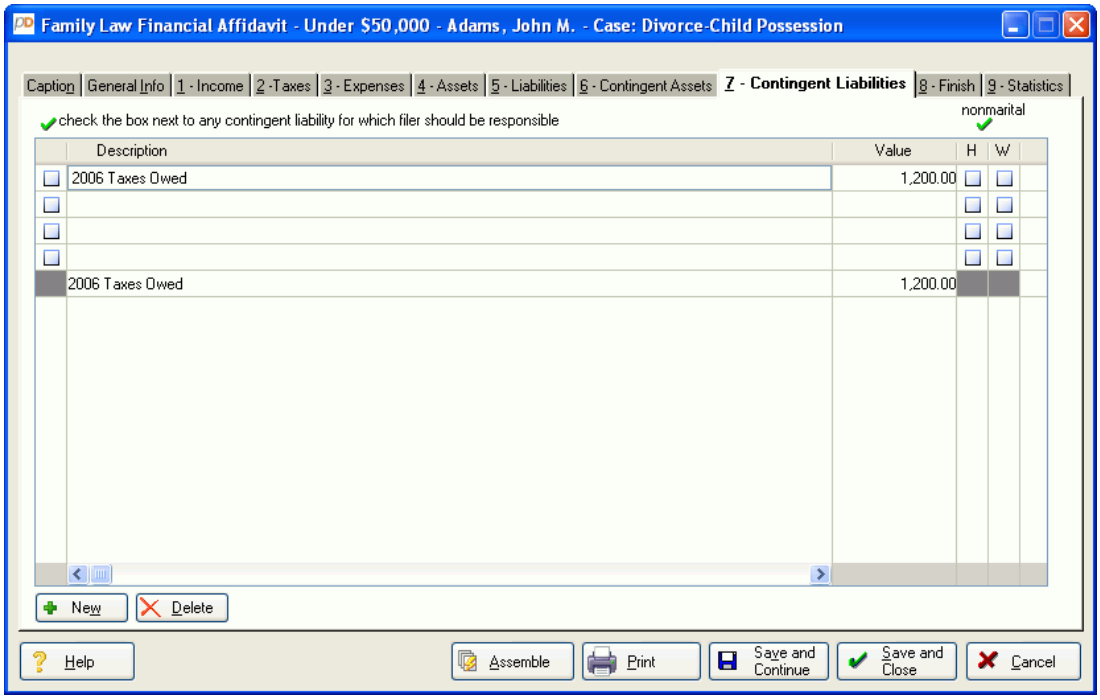



Figure 10, Contingent Liabilities Form

Examples of **Contingent Liabilities** include possible lawsuits, future unpaid taxes, contingent tax liabilities, debts assumed by another, etc. If you have any possible liabilities, you must list them here. If this is a **dissolution of marriage,** boxes will appear to the right and left of the **Description** and **Value** boxes. The box to the left of the **Description** box is to be checked if the filer should be responsible for the contingent debt(s). The boxes to the right of **Value** indicate to whom you believe the debt(s) belong. Check the **H** (husband) or **W** (wife) box, if the debt(s) are non-marital, to indicate whose responsibility you believe the contingent liability to be.

# Finish Form

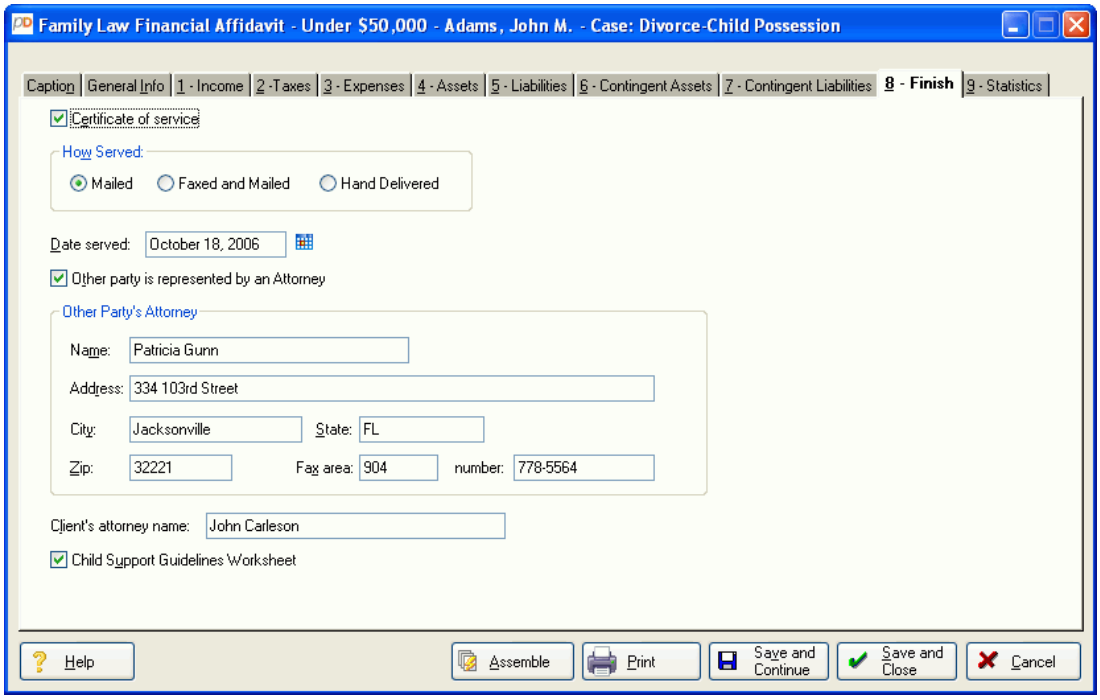



Figure 11, Finish Form

Enter whether there is a certificate of service. If so, enter the method and date of service. Also indicate if the other party has an attorney. If so, enter the attorney's name and mailing address and fax number.

Check the **Child Support Guidelines Worksheet** box if a worksheet **is** or **will be** filed in this case. You **must** file a worksheet if the case involves the establishment or modification of child support.

# Statistics Form

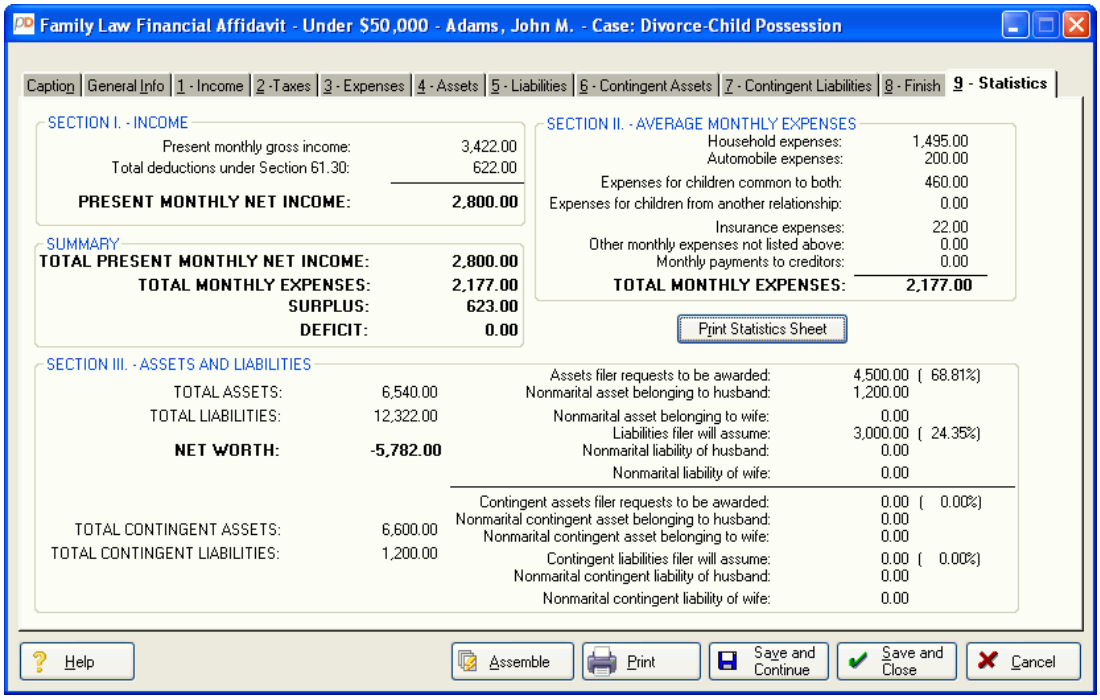

Family Law Financial Affidavit - Under $50,000 - Adams, John M. - Case: Divorce-Child Possession
Caption
General Info
1 - Income
2 -Taxes
3 - Expenses
4 - Assets
5 - Liabilities
6 - Contingent Assets
7 - Contingent Liabilities
8 - Finish
9 - Statistics
SECTION I. - INCOME
Present monthly gross income: 3,422.00
Total deductions under Section 61.30: 622.00
PRESENT MONTHLY NET INCOME: 2,800.00
SUMMARY
TOTAL PRESENT MONTHLY NET INCOME: 2,800.00
TOTAL MONTHLY EXPENSES: 2,177.00
SURPLUS: 623.00
DEFICIT: 0.00
SECTION II. - AVERAGE MONTHLY EXPENSES
Household expenses: 1,495.00
Automobile expenses: 200.00
Expenses for children common to both: 460.00
Expenses for children from another relationship: 0.00
Insurance expenses: 22.00
Other monthly expenses not listed above: 0.00
Monthly payments to creditors: 0.00
TOTAL MONTHLY EXPENSES: 2,177.00
Print Statistics Sheet
SECTION III. - ASSETS AND LIABILITIES
TOTAL ASSETS: 6,540.00
TOTAL LIABILITIES: 12,322.00
NET WORTH: -5,782.00
TOTAL CONTINGENT ASSETS: 6,600.00
TOTAL CONTINGENT LIABILITIES: 1,200.00
Assets filer requests to be awarded: 4,500.00 ( 68.81%)
Nonmarital asset belonging to husband: 1,200.00
Nonmarital asset belonging to wife: 0.00
Liabilities filer will assume: 3,000.00 ( 24.35%)
Nonmarital liability of husband: 0.00
Nonmarital liability of wife: 0.00
Contingent assets filer requests to be awarded: 0.00 ( 0.00%)
Nonmarital contingent asset belonging to husband: 0.00
Nonmarital contingent asset belonging to wife: 0.00
Contingent liabilities filer will assume: 0.00 ( 0.00%)
Nonmarital contingent liability of husband: 0.00
Nonmarital contingent liability of wife: 0.00
Help
Assemble
Print
Save and Continue
Save and Close
Cancel

Figure 12, Statistics Form

**Statistics** is a worksheet that calculates and shows present monthly net income, total monthly expenses, total assets and liabilities, net worth, and whether there is a surplus or deficit income. If you checked the **Dissolution of Marriage** box on the **Caption** form, a box will appear on the statistics worksheet that lists assets, liabilities, and contingent assets and liabilities (including nonmarital) each party will assume. If you did not check the **Dissolution of Marriage** box on the **Caption** form, the box will not appear.To print the statistics worksheet, click **Print.** A question box will appear that asks if you would like to preview the report. If you choose **Yes,** a window will open that shows the statistics worksheet. You may view the completed document from this form or click the printer on the toolbar to print this report. If you choose **No,** the report will print. If you choose **Cancel,** the preview window closes.

# Tax Calculator

The **Tax Calculator** allows you to calculate your federal income, FICA, Medicare and self-employment taxes and automatically uses the calculations to enter monthly net income information into the **Child Support Guidelines** calculator and the **Financial Affidavits.** There are five to six tabs on the **Tax Calculator** depending on if you want to use itemized or standard deductions. If you choose to use itemized deductions, the **Tax Deductions** tab appears.

The amounts that you enter for a client on the **Income** form will also be used in the Financial Affidavit. If you have completed the Financial Affidavit prior to using the **Tax Calculator,** the Income form will display the Financial Affidavit amounts. If you do not want to change the Financial Affidavit amounts that appear, you must create a new case when using the **Child Support Guidelines.**

## Opening the Tax Calculator

### Child Support Guidelines

If you are using the **Child Support Guidelines:**

1. Click the **Monthly Net Income** tab.
2. Click the **Post Dissolution Filing Status** or **Filing status** drop-down arrow.
   a. Select **Head of Household, Single** or **Surviving Spouse** from the drop-down list that appears.
   b. If you select **Married filing jointly** or **Married filing separately,** you cannot access the **Tax Calculator.**
3. Click the **Calculate Monthly Net Income** button.

### Financial Affidavit Program

If you are using one of the **Financial Affidavits:**

1. Click the **Taxes** tab.
2. Click the **Post Dissolution Filing Status** or **Filing status** drop-down arrow.
   a. Select **Head of Household**, **Single** or **Surviving Spouse** from the drop-down list that appears.
   b. If you select **Married filing jointly** or **Married filing separately,** you cannot access the **Tax Calculator.**
3. Click the **Tax Calculator** button.

## Using the Tax Calculator

Click the links that follow to jump to to the listed topics or scroll down to see the topics in order.

**Tax Calculator Toolbar** 158
**General Form** 158
**Income Form** 159
**Adjustments Form** 160
**Credits Form** 161
**Tax Deductions** 162

Summary Report 163
Tax Calculator's Limitations 163

## Tax Calculator Toolbar

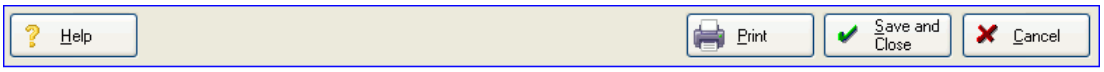



Figure 1, Tax Calculator Toolbar

**Help -** Clicking the **Help** button will take you to the help menu. If you have any questions regarding the use of the **Tax Calculator**, you can find solutions by checking in **Help**.

**Print -** Clicking the **Print** button opens a window that asks if you would like to preview the report. Clicking **No** will start the print job. If you click **Yes**, the report will display on the screen and you are given the opportunity to print or exit after previewing the report. Clicking **Cancel** will allow you to remain in the **Tax Calculator**.

**Save and Close -** When working in a client's case file, clicking the **Save and Close** button will close the **Tax Calculator** window and save any changes you have made to the file. When you return to your client's case, the **Tax Calculator** will reflect all changes made before you saved the document.

**Cancel -** When working in a client's case file, clicking the **Cancel** button will display a prompt that asks if you would like to exit without saving. If you click **No**, you will be returned to the **Tax Calculator** screen to finish inputting data. If you click **Yes**, your answers will not be saved and you will exit to the Financial Affidavit or the Child Support Calculator. If you click **Cancel** and you are not using a client's case file, you will be returned to the Financial Affidavit or the Child Support Calculator.

## General Form

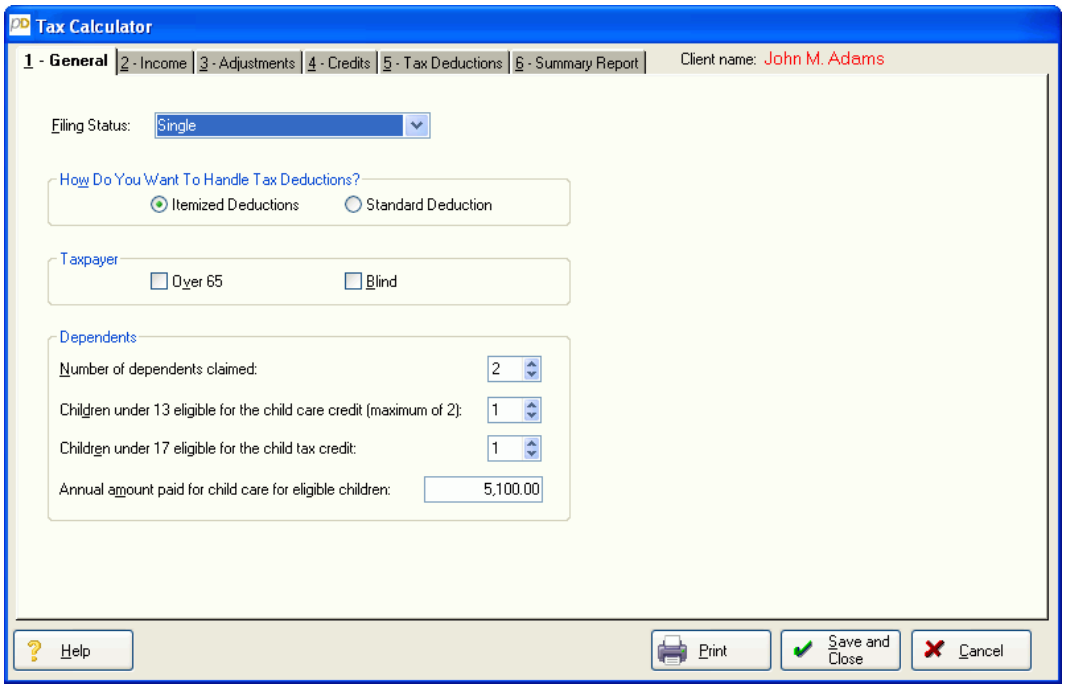



Figure 2, General Form

The **General** form requests basic information about the tax filer and his/her children. To complete the **General** form:

1. Click the drop-down arrow beside the **Filing Status** field and choose whether you are filing as the **Head of Household, Single** parent or the **Surviving Spouse.**
2. Depending on how you want to handle the deductions, click the **Itemized Deductions** or the **Standard Deduction** radio button. If you click the **Itemized Deductions** radio button, the **Tax Deductions** tab is added to the **Tax Calculator** so you may list the itemized deductions.
3. If the taxpayer is **Over 65** and/or **Blind**, place a check in the appropriate checkbox.
4. In the **Dependents** section, use the spin buttons to select the numbers for each field in the section.
   a. **Number of Dependents Claimed.** Select the number of the tax filer's dependents who will be claimed. When the program performs tax calculations, the number entered here is added to the tax filer's personal exemption to compute the total number of exemptions used in the calculations.
   b. **Children Under 13 Eligible for the Child Care Credit (Maximum of 2),** and the
   c. **Children Under 17 Eligible for the Child Tax Credit.**
5. Enter the **Annual Amount Paid for Child Care for Eligible Children** in the corresponding field.

## Income Form

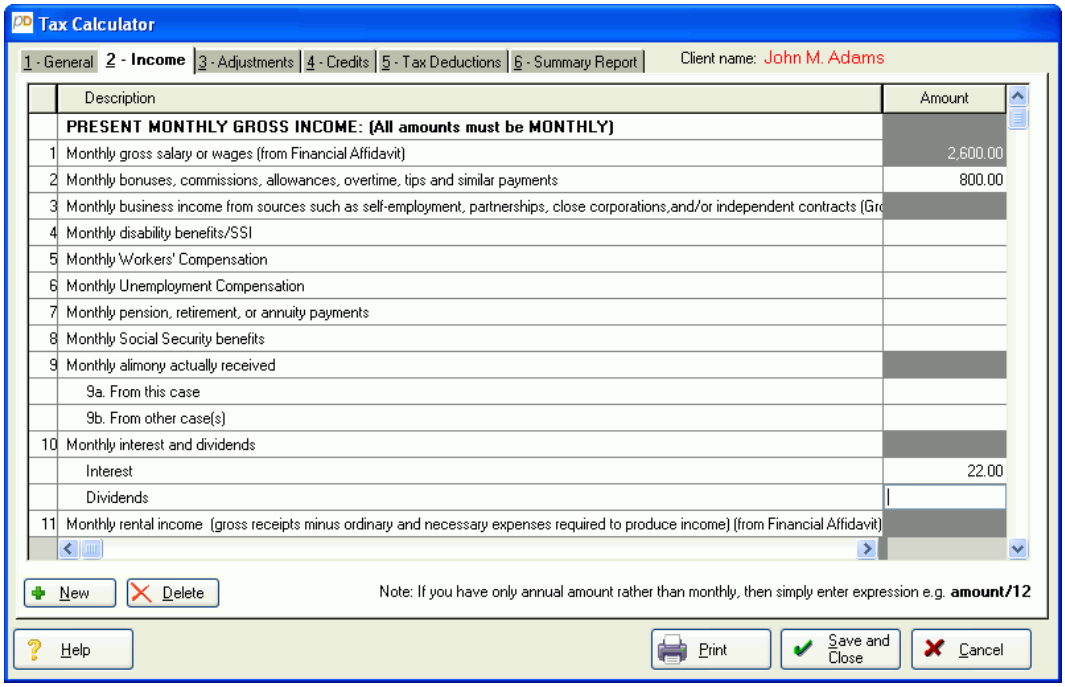

Tax Calculator
1 - General
2 - Income
3 - Adjustments
4 - Credits
5 - Tax Deductions
6 - Summary Report
Client name: John M. Adams
Description
Amount
PRESENT MONTHLY GROSS INCOME: (All amounts must be MONTHLY)
1 Monthly gross salary or wages (from Financial Affidavit) 2,600.00
2 Monthly bonuses, commissions, allowances, overtime, tips and similar payments 800.00
3 Monthly business income from sources such as self-employment, partnerships, close corporations,and/or independent contracts (Gr
4 Monthly disability benefits/SSI
5 Monthly Workers' Compensation
6 Monthly Unemployment Compensation
7 Monthly pension, retirement, or annuity payments
8 Monthly Social Security benefits
9 Monthly alimony actually received
9a. From this case
9b. From other case(s)
10 Monthly interest and dividends
Interest 22.00
Dividends
11 Monthly rental income (gross receipts minus ordinary and necessary expenses required to produce income) (from Financial Affidavit)
New
Delete
Note: If you have only annual amount rather than monthly, then simply enter expression e.g. amount/12
Help
Print
Save and Close
Cancel

Figure 3, Income Form

The **Income** form has fields that you complete regarding the filer's **Present Monthly Gross Income** and **Present Monthly Deductions.** The **Total Present Monthly Income** and the **Total Deductions Allowable** are calculated and used to calculate the **Present Net Monthly Income.**

If you entered the **Tax Calculator** from the **Child Support Guidelines, New** and **Delete** buttons will appear on the **Income** form (as shown in Figure 3). You may add or remove fields on the **Other recurring income** line of the **Income** form by clicking the **More** or **Remove** button at the bottom left of the form.

**Note:** You will not see the **New** and **Delete** buttons on the **Income** form if you entered the **Tax Calculator** through one of the **Financial Affidavits.**

If you only have annual amounts rather than monthly, enter the expression **amount/12** in the field (where **amount** equals the annual amount that you have for the income or deduction being claimed for that field). Statutory employees (indicated on taxpayer's W-2 form) should enter their income as a wage on **Monthly gross salary or wages** line of the **Income** form.

## Adjustments Form

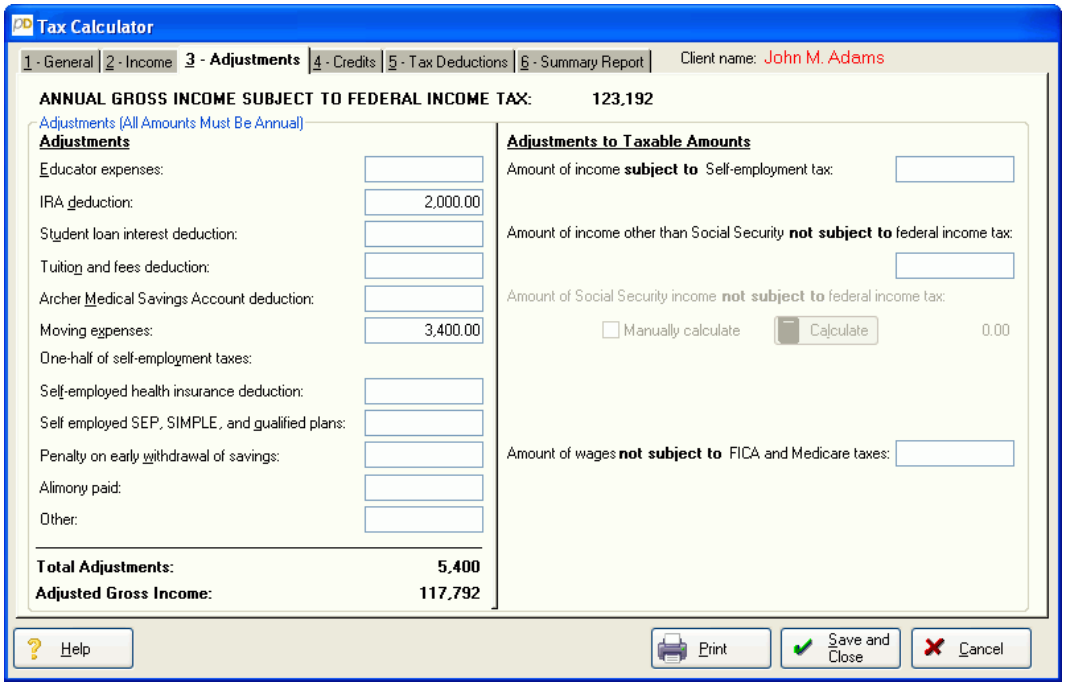

Tax Calculator
1 - General
2 - Income
3 - Adjustments
4 - Credits
5 - Tax Deductions
6 - Summary Report
Client name: John M. Adams
ANNUAL GROSS INCOME SUBJECT TO FEDERAL INCOME TAX: 123,192
Adjustments (All Amounts Must Be Annual)
Adjustments
Educator expenses:
IRA deduction: 2,000.00
Student loan interest deduction:
Tuition and fees deduction:
Archer Medical Savings Account deduction:
Moving expenses: 3,400.00
One-half of self-employment taxes:
Self-employed health insurance deduction:
Self employed SEP, SIMPLE, and qualified plans:
Penalty on early withdrawal of savings:
Alimony paid:
Other:
Total Adjustments: 5,400
Adjusted Gross Income: 117,792
Adjustments to Taxable Amounts
Amount of income subject to Self-employment tax:
Amount of income other than Social Security not subject to federal income tax:
Amount of Social Security income not subject to federal income tax:
Manually calculate
Calculate
0.00
Amount of wages not subject to FICA and Medicare taxes:
Help
Print
Save and Close
Cancel

Figure 4, Adjustments Form

The **Adjustments** form allows you to adjust the amount of **Annual Gross Income Subject to Federal Income Tax.** When entering adjustments, all amounts should be entered as annual amounts.

The **Adjustments** form is divided into two parts: **Adjustments** and **Adjustments to Taxable Amounts.**

On the left side of the form you enter **Adjustments:**

1. In the field to the right of the adjustment's category, fill in the amount of the adjustment. These amounts are annual amounts, make sure to calculate the annual amount for the adjustment and enter the annual amount in the field.
2. The **Total Adjustments** and **Adjusted Gross Income** are automatically calculated from the adjustments you enter.

On the right side of the form you enter **Adjustments to Taxable Amounts.**

1. **Amount of income subject to Self-employment tax** – Self-employment tax is automatically calculated when you enter an amount in this field.
2. **Amount of income other than Social Security not subject to federal income tax** – Enter the amount of any income (other than Social Security) not subject to federal income tax in this field.

3. **Amount of Social Security income not subject to federal income tax** – This field is activated and the income amount is calculated only if you entered an amount in the **Monthly Social Security benefits** field of the **Income** form.
   a. Click the **Calculate** button.
      i. Provide the requested information.
      ii. Click **OK.**
      iii. The **Amount of Social Security income not subject to federal income tax** is calculated and appears in the field, or
   b. Manually enter the non-taxable portion in the field.
4. **Amount of wages not subject to FICA and Medicare taxes** – Enter the amount of wages that are not subject to FICA or Medicare taxes in this field.

## Credits Form

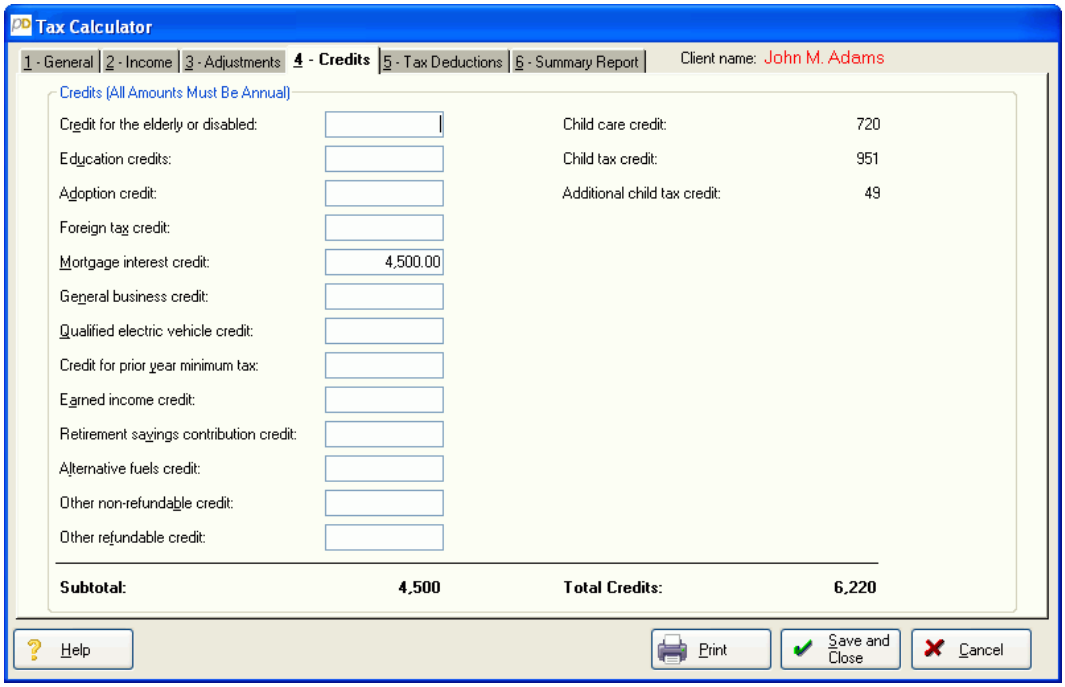



Figure 5, Credits Form

The **Credits** form allows you to enter the credits that the filer is claiming. As you enter the credits, the **Subtotal** of the credits being claimed is calculated. The **Child care credit, Child tax credit, Additional child tax credit** and **Total Credits** are also automatically calculated from the information that you entered on the **General** form.

# Tax Deductions Form

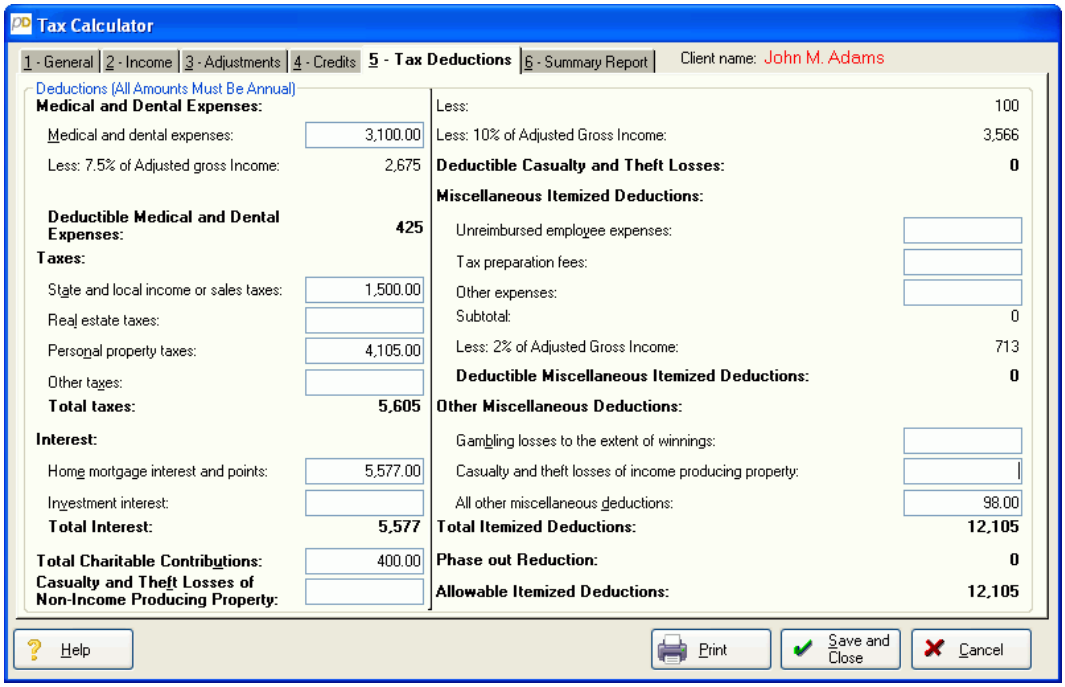



Figure 6, Tax Deductions Form

The **Tax Deductions** form only appears if you choose the **Itemized Deductions** radio button on the **General** form. The **Tax Deductions** form has fields to list the itemized deductions.

Several amounts are calculated on this form from the information that you enter. The amounts calculated on the **Tax Deductions** form are:

1. Deductible Medical and Dental Expenses.
2. Total Taxes.
3. Total Interest.
4. Deductible Casualty and Theft Losses.
5. Deductible Miscellaneous Itemized Deductions.
6. Total Itemized Deductions.
7. Phase out Reduction.
8. Allowable Itemized Deduction.

In the **Other Miscellaneous Deductions** field, you should enter the total of all other miscellaneous deductions that are allowed in the **Instructions for Schedule A, Itemized Deductions** of the **Instructions for Schedules A & B** pamphlet. You may obtain the **Instructions for Schedules A & B** from the IRS or download them from the IRS website.

# Summary Report Form

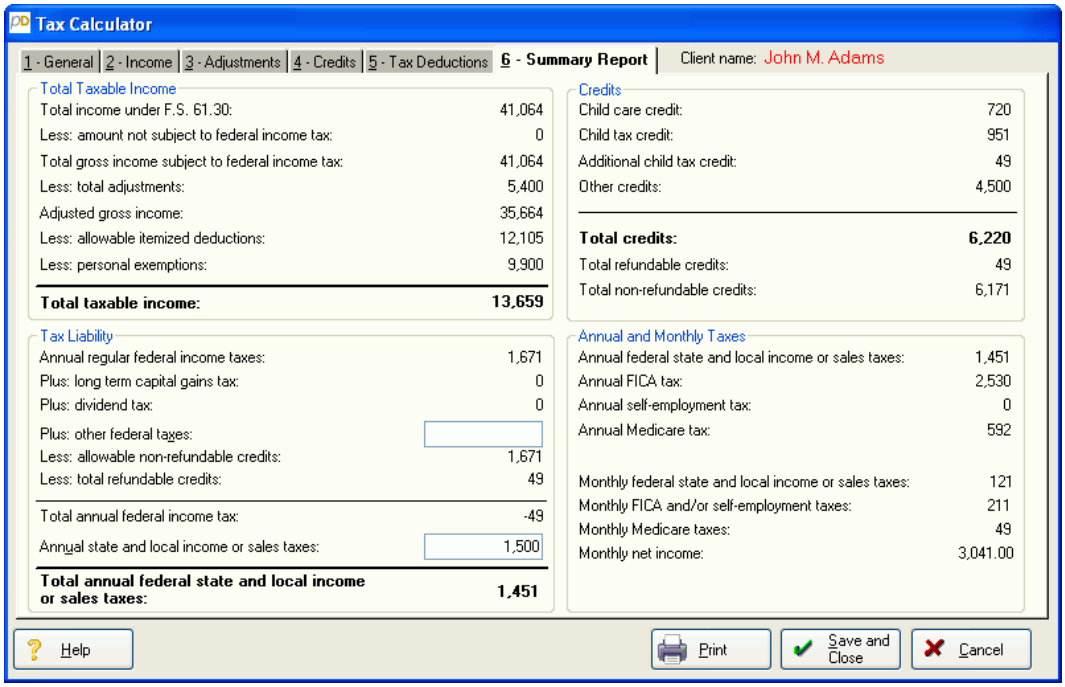

Tax Calculator
1 - General
2 - Income
3 - Adjustments
4 - Credits
5 - Tax Deductions
6 - Summary Report
Client name: John M. Adams
Total Taxable Income
Total income under F.S. 61.30: 41,064
Less: amount not subject to federal income tax: 0
Total gross income subject to federal income tax: 41,064
Less: total adjustments: 5,400
Adjusted gross income: 35,664
Less: allowable itemized deductions: 12,105
Less: personal exemptions: 9,900
Total taxable income: 13,659
Credits
Child care credit: 720
Child tax credit: 951
Additional child tax credit: 49
Other credits: 4,500
Total credits: 6,220
Total refundable credits: 49
Total non-refundable credits: 6,171
Tax Liability
Annual regular federal income taxes: 1,671
Plus: long term capital gains tax: 0
Plus: dividend tax: 0
Plus: other federal taxes:
Less: allowable non-refundable credits: 1,671
Less: total refundable credits: 49
Total annual federal income tax: -49
Annual state and local income or sales taxes: 1,500
Total annual federal state and local income or sales taxes: 1,451
Annual and Monthly Taxes
Annual federal state and local income or sales taxes: 1,451
Annual FICA tax: 2,530
Annual self-employment tax: 0
Annual Medicare tax: 592
Monthly federal state and local income or sales taxes: 121
Monthly FICA and/or self-employment taxes: 211
Monthly Medicare taxes: 49
Monthly net income: 3,041.00
Help
Print
Save and Close
Cancel

Figure 7, Summary Report Form

The **Summary Report** form displays the **Taxes Summary** report information. The sections that are displayed are the **Total Taxable Income, Tax Liability, Credits** and **Annual and Monthly Taxes.**

1. You can add other federal taxes (e.g., Advanced Earned Income Credit) in the **Plus: other federal taxes** field. The **Total annual federal income tax** amount is calculated and displayed on the bottom left of the form.
2. The **State and local income tax** field will display the amount that you entered on the **Adjustments** form or you can fill in the amount from this form.
3. The **Total annual federal, state and local income tax** is calculated by adding the **Total annual federal income tax** plus the **Annual state and local income tax.**

# Tax Calculator's Limitations

This product is designed to accommodate the typical taxpayer. If the taxpayer's situation encompasses any of the following items, this program may not be appropriate and you should consult a tax advisor.

- Passive activity loss limitations
- At risk limitations
- Investment interest expense limitations
- Alternative minimum tax liability
- Recurring gains on collectibles
- Excluded income from American Samoa or Puerto Rico
- Scholarship or fellowship grants that are excluded from income
- Church employee income subject to self-employment tax
- Optional methods for completion of self-employment tax

# Probate Inventory

It's easy to create estate inventories for your probate matters with the **Probate Inventory** program. The **Probate Inventory** program completely eliminates manual calculations, simplifies your work and dramatically slashes the time necessary to handle probate matters.

List the necessary information once and ProDoc automatically calculates the value of the estate. You can differentiate between various types of real and personal property, including out-of-state property. Use this program with the **Probate Accounting** program for maximum benefit.

**Opening the Probate Inventory Program**

1. On ProDoc's main menu, click **PowerPacks → Probate → Probate Inventory.**
2. The **Select a Case** window appears. To find the client you want to use:
   a. Type the first few letters of the client's last name. As you type, the highlight will move to the next match on the client list. To start over, press the **Backspace** key on your keyboard.
   b. You can also use the scroll bar at the right side of the window to scroll through the alphabetical list.
3. When the selected client is highlighted, you can double-click the name, press the right arrow key on your keyboard, or click the **Show Cases** button to view the client's cases.
4. Select a case by double-clicking a case title. You can also click the title once, then press the **Enter** key or click the **Select Case** button.
5. The program opens to the **General** form.

**Navigating the Probate Inventory**

There are six tabs across the top of the **Probate Inventory,** starting with **General Information** and ending with **Out of State Real Property.** Each tab represents a different form.

To move from one form to another, position the cursor over the tab you want to use and click it. You may also press **ALT** + the desired form's tab number. You will be shown the form for the tab you choose.

**NOTE:** Use the numbers on the top row of the keyboard; pressing **Num Lock** and using the numeric keypad will not work.

There are multiple fields to complete on each form of the **Probate Inventory**. To navigate from one field to another you may click the field you would like to use, or you may press the **Tab** key on your keyboard to move forward, and the combination of the **Shift** and **Tab** keys to move backwards through the fields.

**Probate Inventory Toolbar**

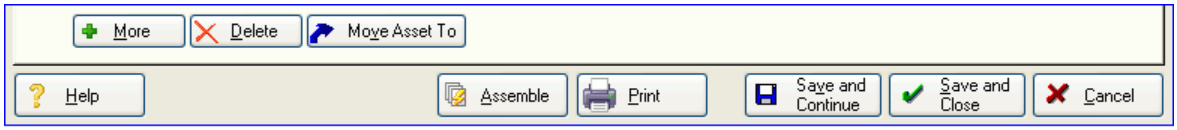



Figure 1, Probate Inventory Toolbar

**More / Delete**

The **More** and **Delete** buttons appear on the forms for tabs **Exempt Homestead** through **Out of State Real Property.** Clicking the **More** button will add more blank lines to the form, so you may input additional items. Clicking the **Delete** button will remove any lines that you have highlighted.

**Move Asset To**

The **Move Asset To** button appears on the forms for tabs **Exempt Homestead** through **Out of State Real Property.** This button is provided so you may easily move an asset from one category to another. Highlighting an asset and clicking the **Move Asset To** button will cause a submenu to appear. There are five choices listed on this submenu that represent the five forms that display the **Move Asset To** button. When you click one of the choices, the asset that was highlighted is moved to the list on the form that you selected from the submenu.

**Help**
Clicking the **Help** button will take you to the help menu. If you have any questions regarding the use of the **Probate Inventory,** you can find solutions by checking **Help**.
**Assemble**
Clicking the **Assemble** button closes the **Probate Inventory 's** window and opens the **Starting Document Assembly** window. From this window you may start a document assembly session. You must have selected a client and case if you want the answers you input for the **Probate Inventory** to carry over to your assembly session. You may save even more time by unchecking the **Review prior answers** box on the **Starting Document Assembly** window (this allows you to assemble a document without having to review answers that have been input previously).
**Print**
Clicking the **Print** button opens a window that asks if you would like to preview the report. Clicking **No** will start the print job. If you click **Yes,** the report will display on the screen and you are given the opportunity to print or exit after previewing the report. Clicking **Cancel** will allow you to remain in the **Probate Inventory.**
**Save and Continue**
Clicking the **Save and Continue** button will save any changes you have made to the file. You can continue working with the program.
**Save and Close**
Clicking the **Save and Close** button will close the **Probate Inventory** window and save any changes you have made to the file. When you return to your client's case, the **Probate Inventory** will reflect all changes made before you saved the document.

**NOTE:** If you click the **X** button in the upper right hand corner of the **Probate Inventory** window, you will see an onscreen prompt that asks if you would like to exit without saving. If you don't want to save your work since your last session, click the **Yes** button to exit the program. If you want to save your work, click the **No** button and use the **Save and Close** button to close the program. Always use the **Save and Continue** or **Save and Close** buttons to ensure your latest entries are saved.

**Cancel**
Clicking the **Cancel** button will display an onscreen prompt that asks if you would like to exit without saving. If you click **No,** you will be returned to the **Probate Inventory** form to finish inputting data. If you click **Yes,** your answers will not be saved and you will exit to the **ProDoc Main Menu.**
**Information Needed to Complete the Probate Inventory**
You will need the following information:

**General Form** 166**:** (a) county, (b) file number, (c) division, (d) decedent's name, (e) date of death, (f) employer identification number (if known), (g) names of all clients, (h) which client is submitting the inventory, (i) name, mailing address, phone number and bar number of the attorney for personal representative, (j) whether attorney is sole practitioner or a member of a law firm, (k) if a member of a law firm, the law firm's name.

**Exempt Homestead Form** 167**:** description of all exempt homesteads.

**Non-exempt Homestead Form** 168**:** description and value of all non-exempt homesteads.

**Real Property Form** 168**:** description and value of all other real property in Florida that belongs to the estate.

**Personal Property Form** 169**:** description and value of all personal property that belongs to the estate.

**Out of State Real Property Form** 169**:** description of all out of state real property that belongs to the estate.

**Completing the Forms.** The six major forms are discussed in their order of appearance below.

# General Information Form

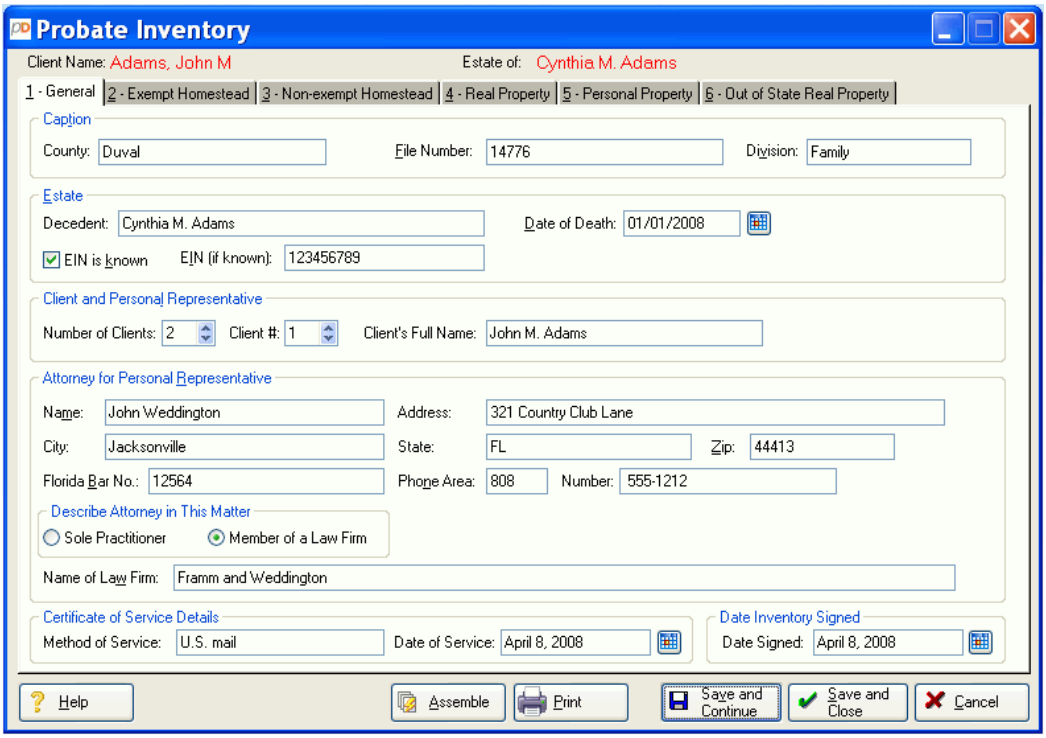



Figure 2, General Form

This form collects jurisdiction, decedent, and representation information. The fields are discussed below by section.

**Caption Section**

Enter the **County**, **File Number**, and **Division** in the labeled fields.

**Estate Section**

1. Enter the **Decedent's** full name and **Date of Death**. Click the calendar icon to easily select the date from a pop-up calendar.
2. If you have the **Employer Identification Number**, click the box entitled **EIN is known.** Enter the employer identification number in the field titled, **EIN (if known)**.

**Client and Personal Representative Section**

1. Choose the **Number of Clients** by clicking the up and down arrows on the field.
2. Select whether the client is the first, second, third, etc. client in the field entitled **Client #**.
3. Enter the **Client's Full Name** in the field provided.
4. Repeat Steps 2 and 3 for every client you need to enter.

**Attorney for Personal Representative Section**

Enter the Attorney's information in the fields provided.

**Describe Attorney in This Matter Section**

Select whether the attorney is a **Sole Practitioner** or a **Member of a Law Firm**. If you choose **Member of a Law Firm**, the field entitled **Name of Law Firm** must be completed. If you choose **Sole Practitioner** nothing further is required in this section.

**Certificate of Service Details Section**

Enter the **Method of Service** and the **Date of Service**. Click the calendar icon to easily select the date from a pop-up calendar.

**Date Inventory Signed Section**

Enter the **Date Signed**. Click the calendar icon to easily select the date from a pop-up calendar.

## Exempt Homestead Form

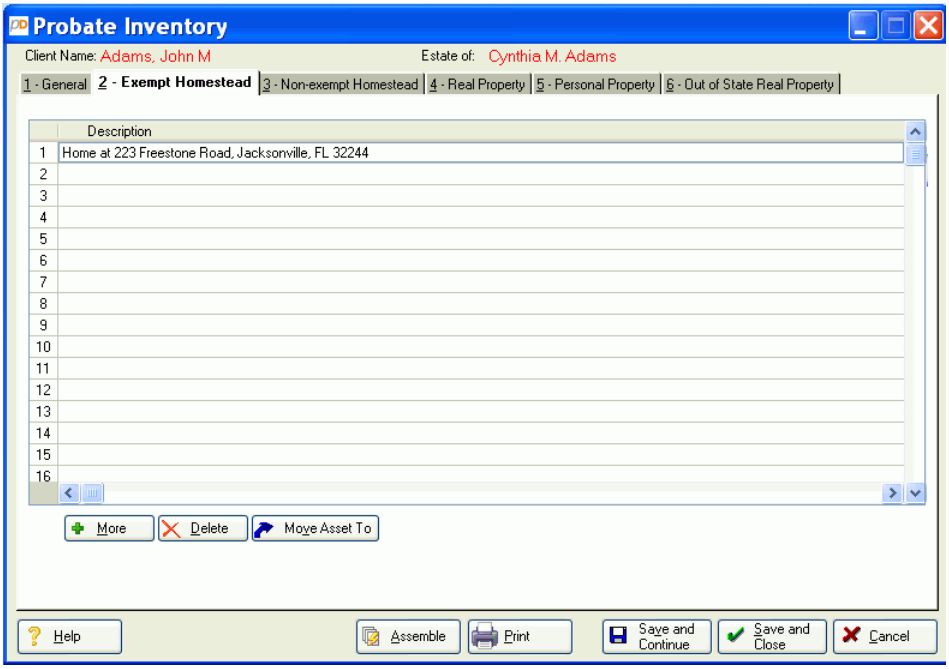



Figure 3, Exempt Homstead Form

This form allows you to list all exempt homesteads. Whether the homestead is exempt from the claims of creditors, whether it is properly devised and whether it is a probate asset may have to be determined by appropriate proceedings.

## Nonexempt Homestead Form

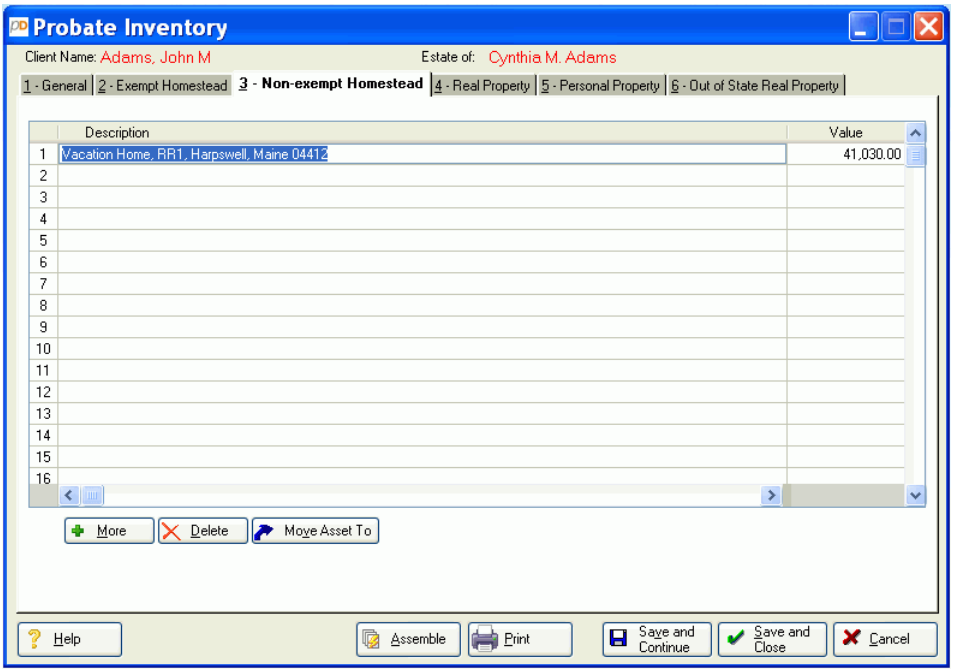



Figure 4, Nonexempt Homestead Form

This form allows you to list all non-exempt homesteads. There is also a column entitled **Value** with space to input the value of the property listed as a non-exempt homestead.

## Real Property Form

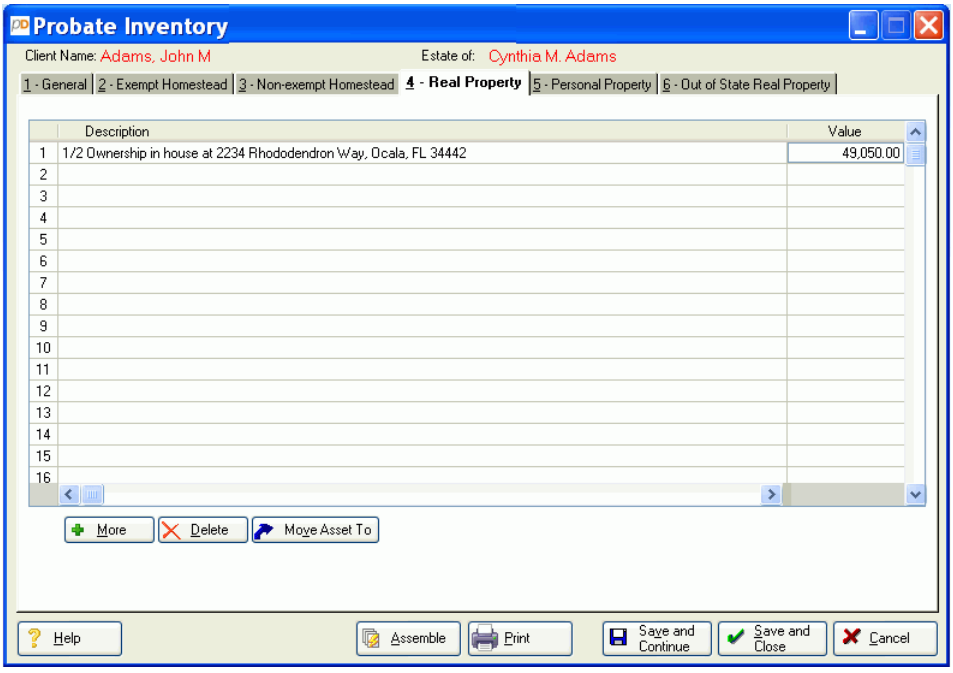



Figure 5, Real Property Form

This form allows you to list other real property located in Florida. There is also a column entitled **Value** with space to input the value of the property listed.

## Personal Property Form

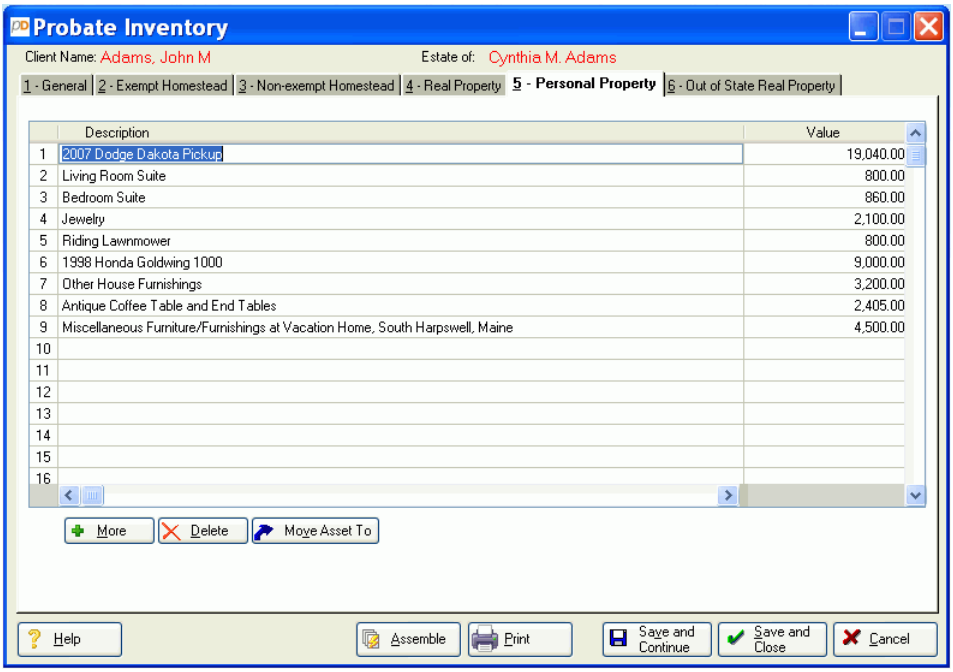



Figure 6, Personal Property Form

This form allows you to list all personal property of the estate. There is also a column entitled **Value** with space to input the value of the property listed.

## Out of State Real Property Form

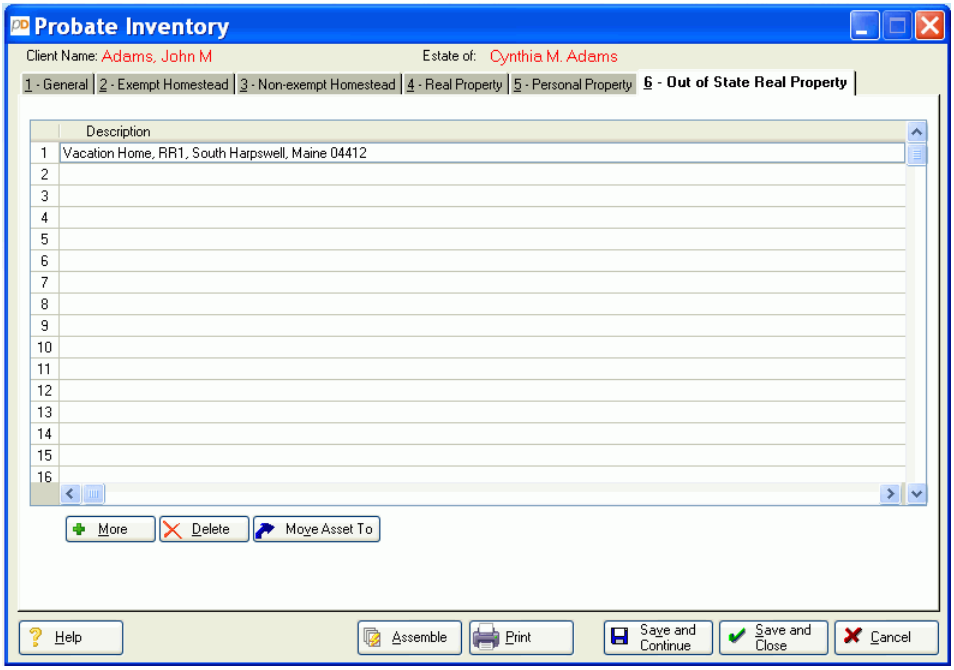



Figure 7, Out of State Real Property Form

This form allows you to list all real property of the estate that is located outside the state of Florida.

# Probate Accounting

It's easy to produce an estate accounting for your probate matters with the **Probate Accounting** program. The **Probate Accounting** program completely eliminates manual calculations, simplifies your work and dramatically slashes the time necessary to handle probate matters.

The **Probate Accounting** lists the transactions that have occurred during the period covered by the accounting, and the assets that remain on hand. It consists of a Summary sheet and Schedule A showing all Receipts, Schedule B showing all Disbursements, Schedule C showing all Distributions, Schedule D showing all Capital Transactions and Adjustments (the effect of which are also reflected in other schedules, if appropriate), and Schedule E showing assets on hand at the end of the accounting period.

**Opening the Probate Accounting Program**

1. On ProDoc's main menu, click **PowerPacks → Probate → Probate Accounting.**
2. The **Select a Case** window appears. To find the client you want to use:
   a. Type the first few letters of the client's last name. As you type, the highlight will move to the next match on the client list. To start over, press the **Backspace** key on your keyboard.
   b. You can also use the scroll bar at the right side of the window to scroll through the alphabetical list.
3. When the selected client is highlighted, you can double-click the name, press the right arrow key on your keyboard, or click the **Show Cases** button to view the client's cases.
4. Select a case by double-clicking a case title. You can also click the title once, then press the **Enter** key or click the **Select Case** button.
5. The program opens to the **General** form.

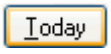
   If you want to use the program without selecting a case, click the **Do not use case** check box to select it, then click the **OK** button. The program will open to the **General** form. Note that your answers will not be saved in a case file.

**Navigating the Probate Accounting**

There are seven tabs across the top of the **Probate Accounting**, starting with **General** and ending with **Summary.** Each tab represents a different form. To move from one form to another, position the cursor over the tab you want to use and click it. You may also press **ALT** + the desired form's tab number (Note: use the numbers on top row of the keyboard; pressing **Num Lock** and using the numbers on the keypad will not work). You will be shown the form for the tab you choose. There are multiple fields to complete on each form. To navigate from one field to another you may click the field you would like to use, or you may press the **Tab** key on your keyboard to move forward, and the combination of the **Shift** and **Tab** keys to move backwards through the fields.

**Selecting Dates from Calendar Icons**

The program provides calendar buttons in selected date input fields which make it easier to input dates. To select dates:

1. Click the calendar button . The calendar appears.
2. Click 

to move the day selector to today's date.
3. and - Click to move back or forward one year.
4. and - Click to move back or forward one month.
5. and - Click to move back or forward one week.
6. Use **Up** and **Down** arrow keyboard keys to move back and forward one week.

7. Use **Left** and **Right** arrow keyboard keys to move back and forward one day.
8. Once you locate the date you want to enter, press **Enter** on your keyboard or click the day to enter it.
9. The calendar closes and the date you chose will appear in the date field you had highlighted or in the next available field if you have not highlighted a date field.
10. Click Close to close the calendar without selecting a date.

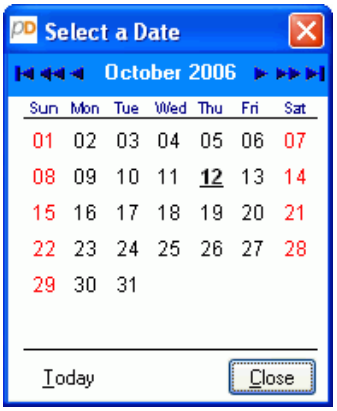



Figure 1, Calendar Tool

**Probate Accounting Toolbar**

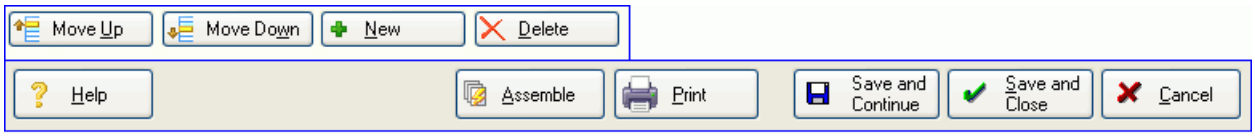



Figure 2, Probate Accounting Toolbar Buttons

**Move Up / Move Down**

The **Move Up** and **Move Down** buttons appear on the forms for tabs **Receipts (A)** through **Assets (E).** Clicking the **Move Up** button will move the highlighted fields up the list. Clicking the **Move Down** button will move the highlighted fields down the list.

**New / Delete**

The **New** and **Delete** buttons appear on the forms for tabs **Receipts (A)** through **Assets (E).** Clicking the **New** button will add more blank lines to the form, so you may input additional items. Clicking the **Delete** button will remove any lines that you have highlighted.

**Help**

Clicking the **Help** button will take you to the help menu. If you have any questions regarding the use of the **Probate Accounting**, you can find solutions by checking **Help**.

**Assemble**

Clicking the **Assemble** button closes the **Probate Accounting 's** window and opens the **Starting Document Assembly** window. From this window you may start a document assembly session. You must have selected a client and case if you want the answers you input for the **Probate Accounting** to carry over to your assembly session. You may save even more time by clearing the **Review prior answers** box on the **Starting Document Assembly** window (this allows you to assemble a document without having to review answers that have been input previously).

**Print**

Clicking the **Print** button opens a window that asks if you would like to preview the report. Clicking **No** will start the print job. If you click **Yes**, the report will display on the screen and you are given the opportunity to print or exit after previewing the report. Clicking **Cancel** will allow you to remain in the **Probate Accounting**.

**Save and Continue**

Clicking the **Save and Continue** button save any changes you have made to the file. You can continue

working in the program.

**Save and Close**

Clicking the **Save and Close** button will close the **Probate Accounting** window and save any changes you have made to the file. When you return to your client's case, the **Probate Accounting** will reflect all changes made before you saved the document.

> **NOTE:** If you click the **X** button in the upper right hand corner of the screen, you will exit ProDoc without saving any of the work that you performed. If you want to save your work, click the **No** button and use the **Save and Close** button to close the program. Always use the **Save and Continue** or **Save and Close** buttons to ensure your latest entries are saved.

**Cancel**

Clicking the **Cancel** button will display an onscreen prompt that asks if you would like to exit without saving. If you click **No,** you will be returned to the **Probate Accounting** form to finish entering data. If you click **Yes,** your answers will not be saved and you will exit to the **ProDoc Main Menu**.

**Information Needed to Complete the Probate Accounting**

To complete the **Probate Accounting,** you must enter the following information:

**General Form** 173**:** (a) county, (b) file number, (c) division, (d) decedent's name, (e) type of accounting, (f) accounting signed date, (g) accounting period beginning and ending date, (h) names of all clients, (i) which client is submitting the inventory, (j) name, mailing address, phone number and bar number of the attorney for personal representative, (k) whether attorney is sole practitioner or a member of a law firm, (l) if a member of a law firm, the law firm's name.

**Receipts (A) Form** 174**:** Date, description, and allocation to income and/or principal of items received during administrations that are not shown on the inventory.

**Disbursements (B) Form** 174**:** Date, description, and allocation to income and/or principal of items paid out during the accounting period.

**Distributions (C) Form** 175**:** Date, description, and allocation to income and/or principal of those items or amounts distributed to beneficiaries during the accounting period.

**Capital Transactions (D) Form** 175**:** Date, description, net gain and net loss of all purchases and sales of assets and any adjustments to the carrying value of any assets.

**Assets (E) Form** 176**:** (a) description, current and carrying value of non-cash assets on hand at close of accounting period, (b) description and amount of cash on hand at the close of the accounting period.

**Summary Form** 177**:** Assets per inventory or on hand at close of last accounting period.

**Completing the Forms.** The seven major forms are discussed in their order of appearance below.

# General Form

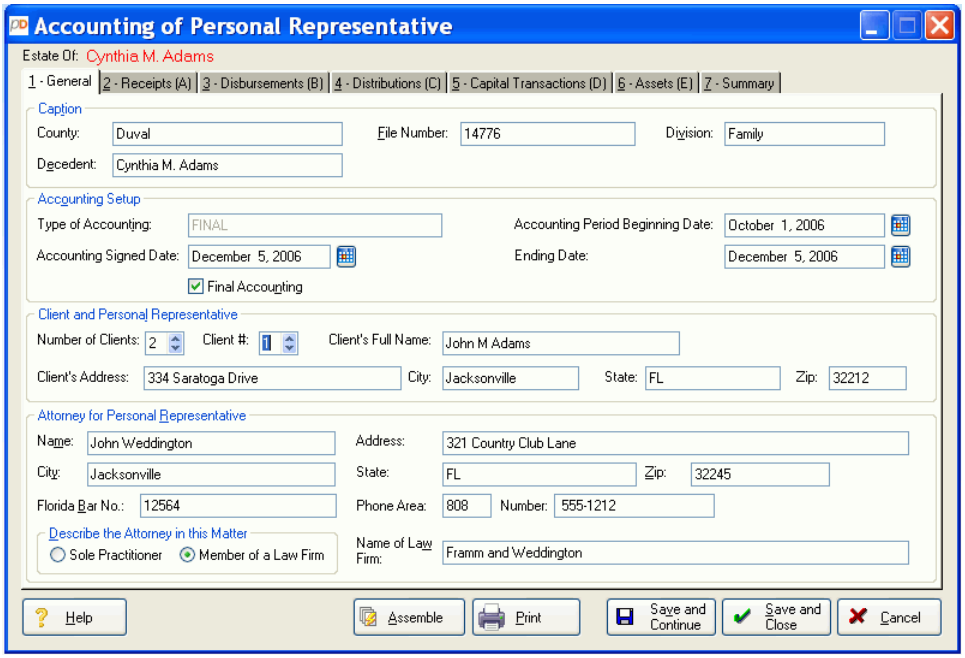



Figure 3, General Form

This form collects jurisdiction, accounting, decedent and representation information. The fields are discussed below by section.

**Caption Section**

1. Enter the **County, File Number**, and **Division** in the labeled fields.
2. Enter the decedent's full name in the **Decedent** field.

**Accounting Setup Section**

1. If you are not performing the final accounting at this time, enter the **Type of Accounting** you are performing (Interim, Annual, etc.) in the field provided. If this is the case, ensure the box entitled **Final Accounting** is not checked.
2. If you are performing the **Final Accounting**, click the box entitled **Final Accounting**. The program will enter "**FINAL**" in the **Type of Accounting** field.
3. Enter the date the accounting was signed in the **Accounting Signed Date** field. Click the calendar icon to easily select the date from a pop-up calendar.
4. Enter the **Accounting Period Beginning Date** and **Ending Date**. Click the calendar icon to easily select the date from a pop-up calendar.

**Client and Personal Representative Section**

1. Choose the **Number of Clients** by clicking the up and down arrows on the field.
2. Select whether the client is the first, second, third, etc. client in the field entitled **Client #**.
3. Enter the **Client's Full Name** in the field provided.
4. Repeat Steps 2 and 3 for every client you need to enter.

**Attorney for Personal Representative Section.** Enter the Attorney's information in the fields provided.

**Describe Attorney in This Matter Section**. Select whether the attorney is a **Sole Practitioner** or a **Member of a Law Firm**. If you choose **Member of a Law Firm**, the field entitled **Name of Law Firm** must be completed. If you choose **Sole Practitioner** nothing further is required in this section.

## Receipts Form

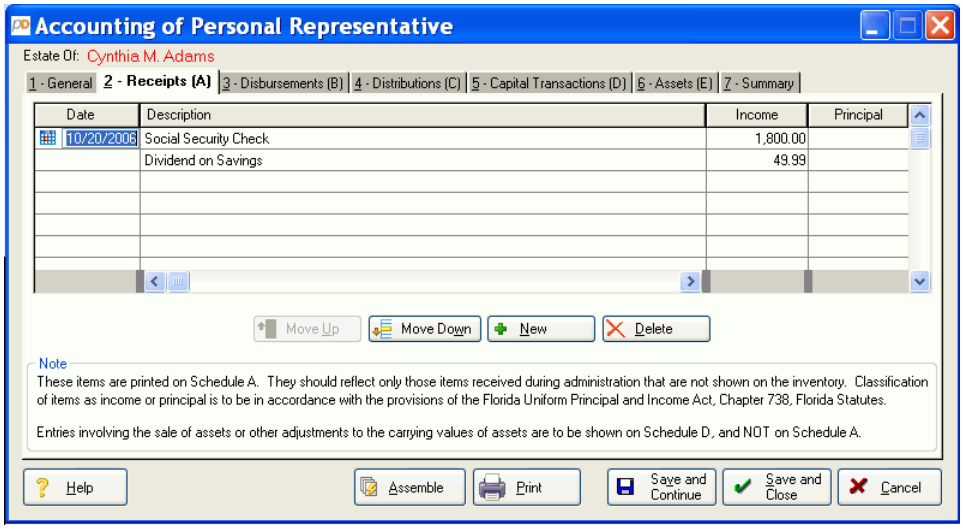

Accounting of Personal Representative
Estate Of: Cynthia M. Adams
1 - General
2 - Receipts (A)
3 - Disbursements (B)
4 - Distributions (C)
5 - Capital Transactions (D)
6 - Assets (E)
7 - Summary
Date
Description
Income
Principal
10/20/2006
Social Security Check
1,800.00
Dividend on Savings
49.99
Move Up
Move Down
New
Delete
Note
These items are printed on Schedule A. They should reflect only those items received during administration that are not shown on the inventory. Classification of items as income or principal is to be in accordance with the provisions of the Florida Uniform Principal and Income Act, Chapter 738, Florida Statutes.
Entries involving the sale of assets or other adjustments to the carrying values of assets are to be shown on Schedule D, and NOT on Schedule A.
Help
Assemble
Print
Save and Continue
Save and Close
Cancel

Figure 4, Receipts Form

This form lists all items received during the period that are not shown on the inventory. If the entries involve the sale of assets or other adjustments to the carrying values of assets, they should be entered on Schedule D instead of this schedule.

Enter the **Date** and **Description** of each receipt and allocate the amount of each receipt as **Income** and/or **Principal**. When you open the **Date** field, a calendar icon appears. Click it to use a calendar tool that makes it easy to add a date to the list.

## Disbursements Form

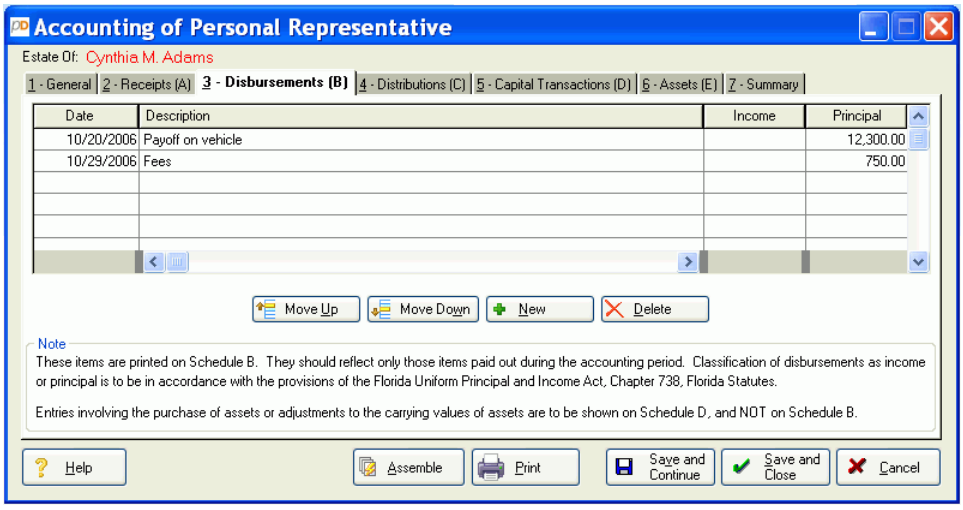

Accounting of Personal Representative
Estate Of: Cynthia M. Adams
1 - General
2 - Receipts (A)
3 - Disbursements (B)
4 - Distributions (C)
5 - Capital Transactions (D)
6 - Assets (E)
7 - Summary
Date
Description
Income
Principal
10/20/2006
Payoff on vehicle
12,300.00
10/29/2006
Fees
750.00
Move Up
Move Down
New
Delete
Note
These items are printed on Schedule B. They should reflect only those items paid out during the accounting period. Classification of disbursements as income or principal is to be in accordance with the provisions of the Florida Uniform Principal and Income Act, Chapter 738, Florida Statutes.
Entries involving the purchase of assets or adjustments to the carrying values of assets are to be shown on Schedule D, and NOT on Schedule B.
Help
Assemble
Print
Save and Continue
Save and Close
Cancel

Figure 5, Disbursements Form

This form lets you list items paid out during the accounting period. If assets are purchased or adjustments made to carrying values of assets, they should be entered on Schedule D instead of this schedule.

Enter the **Date** and **Description** of each disbursement and allocate the amount as **Income** and/or **Principal**. When you open the **Date** field, a calendar icon appears. Click it to use a calendar tool

that makes it easy to add a date to the list.

## Distributions Form

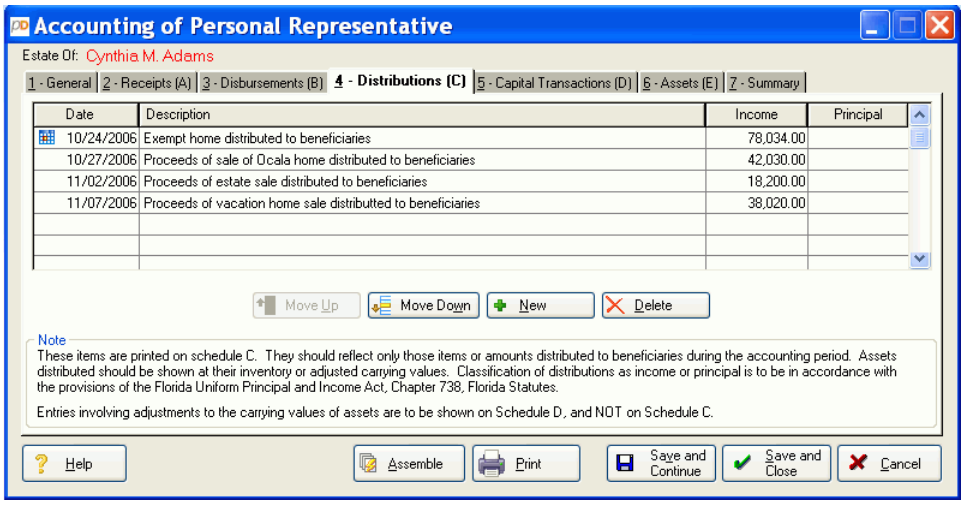

Accounting of Personal Representative
Estate Of: Cynthia M. Adams
1 - General | 2 - Receipts (A) | 3 - Disbursements (B) | 4 - Distributions (C) | 5 - Capital Transactions (D) | 6 - Assets (E) | 7 - Summary
Date
Description
Income
Principal
10/24/2006 Exempt home distributed to beneficiaries 78,034.00
10/27/2006 Proceeds of sale of Ocala home distributed to beneficiaries 42,030.00
11/02/2006 Proceeds of estate sale distributed to beneficiaries 18,200.00
11/07/2006 Proceeds of vacation home sale distributted to beneficiaries 38,020.00
Move Up
Move Down
New
Delete
Note
These items are printed on schedule C. They should reflect only those items or amounts distributed to beneficiaries during the accounting period. Assets distributed should be shown at their inventory or adjusted carrying values. Classification of distributions as income or principal is to be in accordance with the provisions of the Florida Uniform Principal and Income Act, Chapter 738, Florida Statutes.
Entries involving adjustments to the carrying values of assets are to be shown on Schedule D, and NOT on Schedule C.
Help
Assemble
Print
Save and Continue
Save and Close
Cancel

Figure 6, Distributions Form

This form lists those items or amounts distributed to beneficiaries during the accounting period. If the entries involve adjustments to the carrying values of assets, they should be entered on Schedule D instead of this schedule.

Enter the **Date** and **Description** of each distribution and allocate the amount as **Income** and/or **Principal**. Clicking the calendar icon provides a calendar that makes it easy to add a date to the list.

## Capital Transactions Form

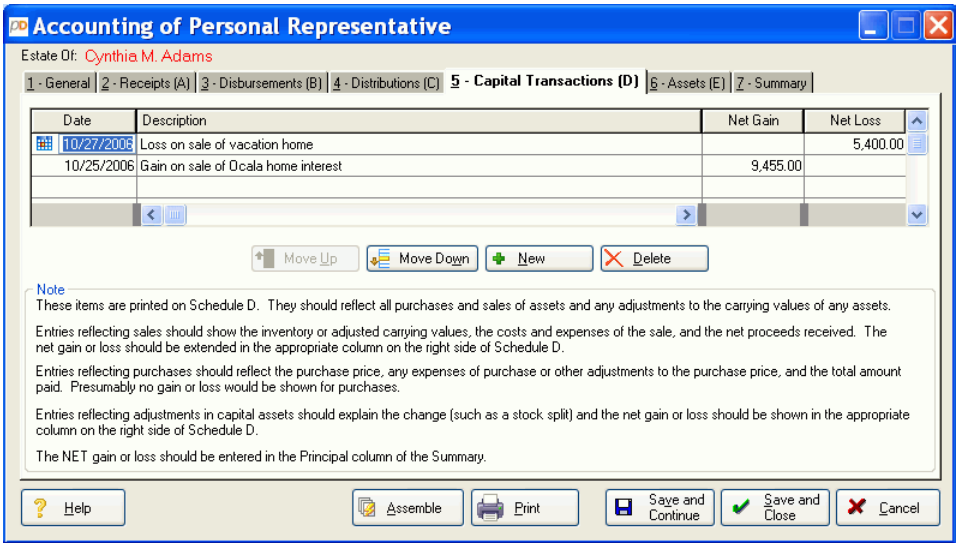

Accounting of Personal Representative
Estate Of: Cynthia M. Adams
1 - General | 2 - Receipts (A) | 3 - Disbursements (B) | 4 - Distributions (C) | 5 - Capital Transactions (D) | 6 - Assets (E) | 7 - Summary
Date
Description
Net Gain
Net Loss
10/27/2006 Loss on sale of vacation home 5,400.00
10/25/2006 Gain on sale of Ocala home interest 9,455.00
Move Up
Move Down
New
Delete
Note
These items are printed on Schedule D. They should reflect all purchases and sales of assets and any adjustments to the carrying values of any assets.
Entries reflecting sales should show the inventory or adjusted carrying values, the costs and expenses of the sale, and the net proceeds received. The net gain or loss should be extended in the appropriate column on the right side of Schedule D.
Entries reflecting purchases should reflect the purchase price, any expenses of purchase or other adjustments to the purchase price, and the total amount paid. Presumably no gain or loss would be shown for purchases.
Entries reflecting adjustments in capital assets should explain the change (such as a stock split) and the net gain or loss should be shown in the appropriate column on the right side of Schedule D.
The NET gain or loss should be entered in the Principal column of the Summary.
Help
Assemble
Print
Save and Continue
Save and Close
Cancel

Figure 7, Capital Transactions Form

This form allows you to list all purchases and sales of assets and any adjustments to the inventory or carrying value of any assets. Entries reflecting sales should show the inventory or adjusted carrying values, the costs and expenses of the sale, and the net proceeds received. Entries reflecting purchases should reflect the purchase price, any expenses of purchase or other adjustments to the purchase price, and the total amount paid. Presumably, no gain or loss would be shown for purchases. If the entries

reflect adjustments in capital assets, you should explain the change (such as a stock split) and the **Net Gain** or **Net Loss** should be shown in the appropriate column.

Enter the **Date** and **Description** of the transaction, along with any **Net Gain** or **Net Loss**. Clicking the calendar icon provides a calendar that makes it easy to add a date to the list.

## Assets Form

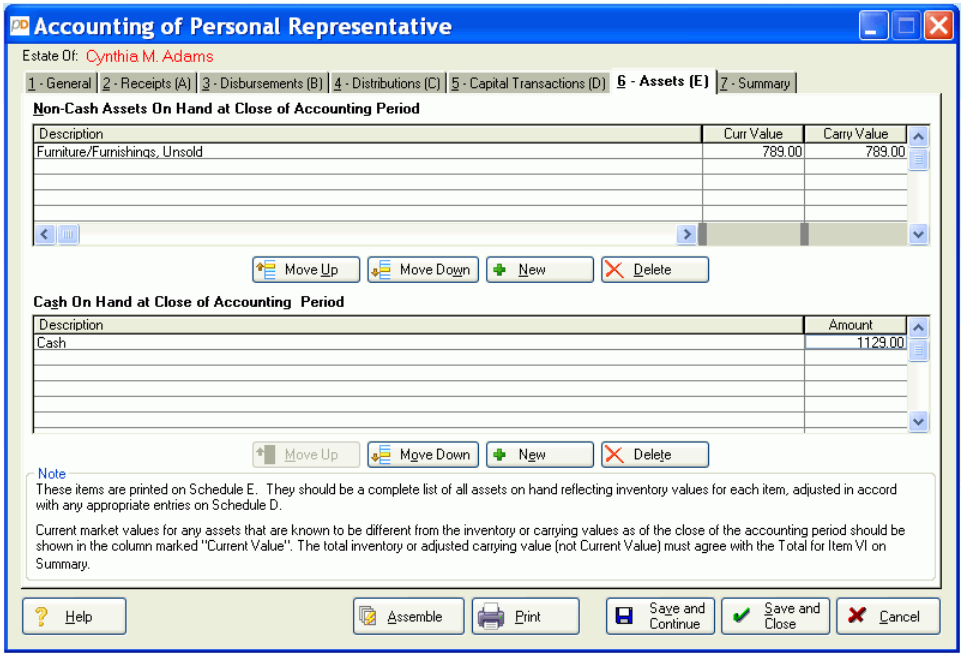

Accounting of Personal Representative
Estate Of: Cynthia M. Adams
1 - General
2 - Receipts (A)
3 - Disbursements (B)
4 - Distributions (C)
5 - Capital Transactions (D)
6 - Assets (E)
7 - Summary
Non-Cash Assets On Hand at Close of Accounting Period
Description
Curr Value
Carry Value
Furniture/Furnishings, Unsold
789.00
789.00
Move Up
Move Down
New
Delete
Cash On Hand at Close of Accounting Period
Description
Amount
Cash
1129.00
Move Up
Move Down
New
Delete
Note
These items are printed on Schedule E. They should be a complete list of all assets on hand reflecting inventory values for each item, adjusted in accord with any appropriate entries on Schedule D.
Current market values for any assets that are known to be different from the inventory or carrying values as of the close of the accounting period should be shown in the column marked "Current Value". The total inventory or adjusted carrying value (not Current Value) must agree with the Total for Item VI on Summary.
Help
Assemble
Print
Save and Continue
Save and Close
Cancel

Figure 8, Assets Form

This form allows you to enter **Non-Cash Assets On Hand at Close of Accounting Period** and **Cash On Hand at Close of Accounting Period**. This schedule should be a complete list of all assets on hand and should reflect inventory values for each item. These inventory values should be adjusted in accord with all appropriate entries on Schedule D.

In the top half of the form, enter the **Description**, **Current Value** (if needed) and **Carry Value** of non-cash assets on hand at the close of the accounting period. Current market values for any assets that are known to be different from the inventory or carrying values as of the close of the accounting period should be shown in the column labeled **Curr Value.** The total inventory or adjusted carrying value (not current value) must agree with the Total for Item **VI** on the **Summary** (located by clicking the **Summary** tab).

In the bottom half of the form, enter a **Description** and **Amount** of any **Cash On Hand**.

# Summary Form

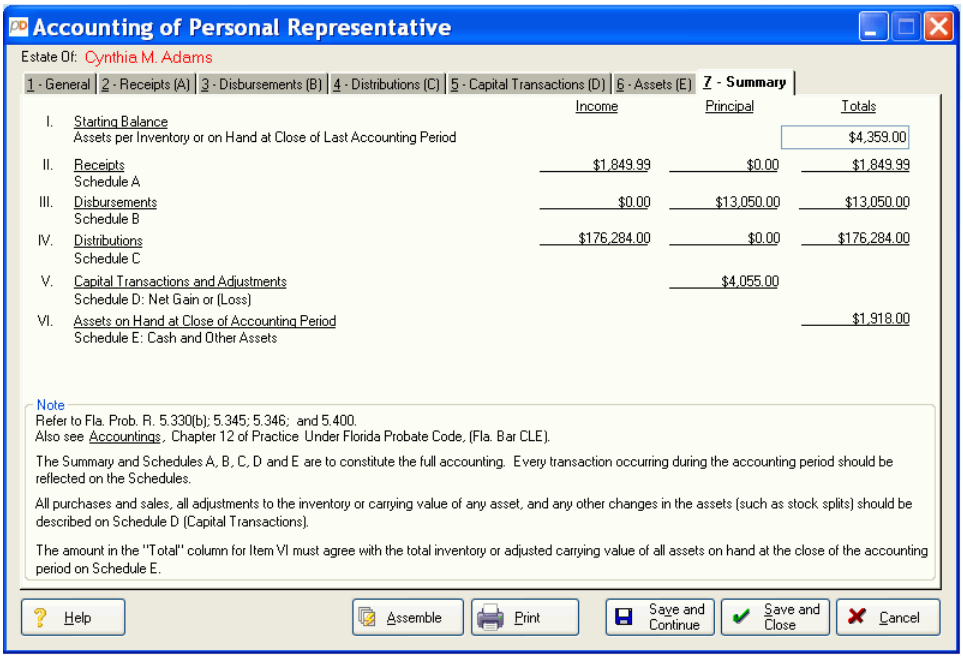

Accounting of Personal Representative
Estate Of: Cynthia M. Adams
1 - General
2 - Receipts (A)
3 - Disbursements (B)
4 - Distributions (C)
5 - Capital Transactions (D)
6 - Assets (E)
7 - Summary
Income
Principal
Totals
I. Starting Balance
Assets per Inventory or on Hand at Close of Last Accounting Period
$4,359.00
II. Receipts
Schedule A
$1,849.99
$0.00
$1,849.99
III. Disbursements
Schedule B
$0.00
$13,050.00
$13,050.00
IV. Distributions
Schedule C
$176,284.00
$0.00
$176,284.00
V. Capital Transactions and Adjustments
Schedule D: Net Gain or (Loss)
$4,055.00
VI. Assets on Hand at Close of Accounting Period
Schedule E: Cash and Other Assets
$1,918.00
Note
Refer to Fla. Prob. R. 5.330(b); 5.345; 5.346; and 5.400.
Also see Accountings, Chapter 12 of Practice Under Florida Probate Code, (Fla. Bar CLE).
The Summary and Schedules A, B, C, D and E are to constitute the full accounting. Every transaction occurring during the accounting period should be reflected on the Schedules.
All purchases and sales, all adjustments to the inventory or carrying value of any asset, and any other changes in the assets (such as stock splits) should be described on Schedule D (Capital Transactions).
The amount in the "Total" column for Item VI must agree with the total inventory or adjusted carrying value of all assets on hand at the close of the accounting period on Schedule E.
Help
Assemble
Print
Save and Continue
Save and Close
Cancel

Figure 9, Summary Form

This form presents a summation of the information that you have entered on the previous forms. At this point you must enter the starting balance. The starting balance consists of assets from the probate inventory or on hand at the close of the last accounting period. The **Summary** and **Schedules A** through **E** constitute the full accounting. Every transaction occurring during the accounting period should be reflected on the Schedules.

The amount of the **Total** column for Item VI must agree with the total inventory or adjusted carrying value of all assets on hand at the close of the accounting period on Schedule E.

# Probate Management System

The **Probate Management System** is a database that stores information pertaining to your client's probate matter. It allows you to keep track of deadlines, decedent's information, client information, documents received, documents needed and the interested parties. With this program, you can keep on top of your probate cases and never miss a filing deadline again.

Click the following links to see detailed information on the listed topic:

**Using the Toolbar Buttons** 179
**Information Used by the Probate Management System** 179
**Reports printed from the program** 181
**Certified Mailer** 189

### Opening the Probate Management System

1. On ProDoc's main menu, click **PowerPacks → Family Law → Probate Management System.**
2. The **Select a Case** window appears. To find the client you want to use:
   a. Type the first few letters of the client's last name. As you type, the highlight will move to the next match on the client list. To start over, press the **Backspace** key on your keyboard.
   b. You can also use the scroll bar at the right side of the window to scroll through the alphabetical list.
3. When the selected client is highlighted, you can double-click the name, press the right arrow key on your keyboard, or click the **Show Cases** button to view the client's cases.
4. Select a case by double-clicking a case title. You can also click the title once, then press the **Enter** key or click the **Select Case** button.
5. The program opens to the **General** form.

### Navigating the Probate Management System

There are six tabs across the top of the **Probate Management System,** starting with **General** and ending with **Certified Mailer.** Each tab represents a different form in the **Probate Management System.**

To move from one form to another, position the cursor over the tab you want to use and click it. You may also press **Alt +** the desired tab's underlined letter. You will be shown the form for each tab you choose.

There are multiple fields to complete on each form of the **Probate Management System.** To navigate from one field to another, you may click the field you would like to use, or you may press the **Tab** key on your keyboard to move forward through the fields. Choose **Shift + Tab** to move backwards through the fields.

### All Forms

Across the top of the Probate Management System you will see the client's name, the name of the Decedent and the **Publication Bar Date.** This date is calculated automatically based upon the date of the first publication of notice. For a detailed discussion of each form, click the links below:

**General Form** 183
**Case Status Form** 184
**Beneficiaries Form** 185

Creditors Form 186

Other Parties Form 187

Certified Mailer Form 188

## Information Used by the Probate Management System

Information that is used by the **Probate Management System** follows. You will need to gather this information in order to fully utilize the program.

**General:** (a) number of clients, (b) client number (according to how they were input), (c) client's full name, (d) whether client is a beneficiary, (e) client's street address, city, state, zip and phone number, (f) decedent's name, birth date, date of death, social security number, address, city, state and zip code, (g) whether there is a will, the date of the will and any codicils, and (h) any case notes that you may want to keep.

**Case Status:** (a) docket number, (b) judge's name, (c) clerk's name, (d) county, (e) court's phone number, (f) date of letters of administration, (g) date of the first publication, (h) date the inventory is due and whether it is done, (i) date the final accounting is due and whether it is done, (j) date the petition for discharge is due and whether it is done, (k) whether the estate is taxable, (l) date the tax return is due and whether it is done, (m) date the case is closed, (n) whether the following documents are needed or have been received: death certificate, last will and testament, vehicle titles, funeral bill and the real estate deeds.

**All Interested Parties:** (a) name, (b) relationship to decedent, (c) mailing address, (d) telephone number, (e) date of birth, (f) whether party is represented by an attorney, (g) party's attorney's name, address and telephone number; and if a creditor (h) account number of debt, (i) amount claimed, (j) nature of claim or debt, (k) date filed, (l) verification of a signed release.

**Beneficiaries:** (a) name, (b) relationship to decedent, (c) mailing address, (d) telephone number, (e) date of birth, (f) whether party is represented by an attorney, (g) party's attorney's name, address and telephone number.

**Creditors:** (a) name, (b) mailing address, (c) telephone number, (d) whether party is represented by an attorney, (e) party's attorney's name, address and telephone number, (f) account number of debt, (g) amount claimed, (h) nature of claim or debt, (i) date filed, (j) verification of a signed release.

**Other Parties:** (a) name, (b) mailing address, (c) telephone number, (d) relationship to decedent or estate, (e) whether party is represented by an attorney, (f) party's attorney's name, address and telephone number.

## Toolbar

Figure 1, Toolbar Buttons

The Probate Management System's toolbar functions are discussed below.

**New / Update / Delete**

The **New, Update** and **Delete** buttons appear on the **Beneficiaries, Creditors** and **Other Parties** forms. Use these buttons to add, change or delete information pertaining to an interested party.

**Select / Select All / Clear All**

The **Select, Select All** and **Clear All** buttons appear on all tab forms except **General** and **Case Status.** These buttons control the status of the parties on the currently visible form.

- Click the **Select** button to place a check in the box next to the highlighted party's name to indicate "selected" status. You can also click the box to place a check in the box or clear a check from the box.
- Click the **Select All** button to select all parties on the current form.
- Click the **Clear All** button to clear the selection of any selected parties on the current form.

A check mark displayed in the box next to the party's name indicates "selected" status and a blank box indicates "not selected." The effects of selection varies by form as follows:

- **Beneficiaries, Creditors** and **Other Parties** forms - The information for any parties selected on these forms is included in print options for **Selected Parties** and is also included if you click the **Clipboard** button.
- **Certified Mailer** form - Parties marked as selected on this form will automatically be listed as recipients in the **Certified Mailer** window. The selected parties on this form are not used for **Clipboard/Print** functions.

**Help**

Click the **Help** button to view the help topic for the active window.

**Clipboard**

Use the **Clipboard** button to copy the name and address information of all selected beneficiaries, creditors or other parties to the clipboard. Parties shown as selected on the **Certified Mailer** form are **not** included unless the party is selected on another form. The information is arranged in block mailing address format. You may then position your cursor and press **Ctrl-V** to paste the text wherever you need it.

**Assemble**

Click the **Assemble** button to start an assembly session in ProDoc and close the **Probate Management System.**

**Print**

Clicking **Print** brings up a list of various print tasks for the party that you have selected. Click the type of print job you want performed and the program will print it for you, or allow you to view the document. If you choose to view the document, you may print the document from the view window. Click **here** 181 to see details on the reports.

**Save and Continue**

Click **Save and Continue** to save your work and continue using the program.

**Save and Close**

Click **Save and Close** to save your work and return you to the main ProDoc window.

**NOTE:** You can also click the X button in the upper right corner of the window to exit the **Probate Management System** without saving your work. A message will appear asking if you are sure that you want to exit without saving your information. To do this, click

**Yes.** To save your work, click **No** and then click either **Save and Continue** or **Save and Close** as desired.

**Cancel**

Click **Cancel** to return to the main ProDoc window and exit the **Probate Management System.** Any information that you input will not be saved (and you will lose it). Only click **Cancel** if you are sure that you do not want to save any information that you have input since last saving your work in the **Probate Management System.**

**Certified Mailer**

This button appears only on the **Certified Mailer** form. Click the button to open the **Certified Mailer.** With this tool, you can select contacts from a list and print certified mail labels for the selected parties. Any parties already selected on the **Certified Mailer** form will be automatically listed as recipients. For details on using the **Certified Mailer,** click **here** 189.

**Calendar Button**

This button only appears on the **Creditors** form, located to the right of the **Clear All** button. Click it to open a calendar tool to which helps you easily select and enter dates. Click **here** 182 to see detailed help for the calendar tool.

## Printing Reports

Several documents may be printed using the **Probate Management System.** You can click the **Print** button on the **toolbar** 179 to reveal the menu of printable documents. These documents are listed and described below.

**Probate Due Dates report**

The **Probate Due Dates** report lists due dates for all clients for the date range you choose. Information that is displayed includes the types of tasks and whether tasks for the selected date range have been completed or not, the name of the decedent, the case for which the task is due and the name of the client.

**General Data Sheet**

The **General Data Sheet** lists all of the court information (docket, judge, clerk, county, etc.), the client's information, the important dates related to the case, the decedent's personal information, status of case-related documents, and any case notes that you created.

**All Interested Parties**

Choosing any of the print options for **All Interested Parties** will print the following information for all parties that are involved with the case. All parties that have been input for the case will be included on the printout. If you want to print information about a particular party, you need to print from the **Selected Parties** option.

1. **Party Information -** This document lists all of the selected party's information, the relationship to the decedent, and if the party is represented by an attorney, the attorney's name, mailing address, phone number and notes for each party for whom notes have been created.
2. **Beneficiary Matrix** - The **Beneficiary Matrix** lists the beneficiaries names and addresses, whether they are a spouse or personal representative of the estate, whether the **Notice of Administration, Will** and **Inventory** have been sent, whether the **Receipt, Release** and **Waiver** have been received, and the Beneficiary's attorney's names, addresses and phone numbers.

3. **Creditor Matrix** - The **Creditor Matrix** lists the creditor's names, addresses, telephone numbers and account information. If a creditor is represented by an attorney then the attorney's name, address and telephone number are listed. Included in an individual creditor's account information are the account number, amount owed, nature of claim or debt, date claim was filed and indications of whether the debt has been paid and a signed release has been obtained. The **Creditor Matrix** report also displays the **Debt Information** and **Claim Information. Debt Information** includes whether the debt is **Secured** or not, the **Status** of the debt as either **Matured** or not and the **Type** of debt as **Contingent, Un-liquidated** or both. **Claim Information** indicates if the claim has been **Filed,** its status as **Accepted, Rejected,** or **Unknown** and whether the claim has been **Paid.**

**Selected Parties**

Choosing any of the print options for **Selected Parties** will print the following information for only the selected parties on the **Beneficiaries, Creditors** and **Other Parties** forms. To select a party for whom to print information, click the box to place a check to the left of the party's name. You can also use the **Select/Select All** buttons. If you want to print information about all parties, you need to print from the **All Interested Parties** option.

1. **Party Information** - This document lists all of the selected party's information, the relationship to the decedent, and if the party is represented by an attorney, the attorney's name, mailing address, phone number and notes for each party for whom notes have been created.
2. **Beneficiary Matrix** - The **Beneficiary Matrix** lists the beneficiary's names and addresses, whether they are a spouse or personal representative of the estate, whether the **Notice of Administration, Will** and **Inventory** have been sent, whether the **Receipt, Release** and **Waiver** have been received, and the Beneficiary's attorney's names, addresses and phone numbers.
3. **Creditor Matrix** - The **Creditor Matrix** lists the creditor's names, addresses, telephone numbers and account information. If a creditor is represented by an attorney then the attorney's name, address and telephone number are listed. Included in an individual creditor's account information are the account number, amount owed, nature of claim or debt, date claim was filed and indications of whether the debt has been paid and a signed release has been obtained. The **Creditor Matrix** report also displays the **Debt Information** and **Claim Information. Debt Information** includes whether the debt is **Secured** or not, the **Status** of the debt as either **Matured** or not and the **Type** of debt as **Contingent, Un-liquidated** or both. **Claim Information** indicates if the claim has been **Filed,** its status as **Accepted, Rejected,** or **Unknown** and whether the claim has been **Paid.**
4. **Envelopes** – To print envelopes for communicating with the parties that are involved with a case, select the parties for whom you would like to print envelopes, click **Print → Selected Parties → Envelopes.** Click **OK** to begin printing. The **Envelopes** feature does not print return addresses on the envelopes.

## Using the Calendar Buttons

ProDoc provides calendar buttons on the **General** and **Case Status** forms, located to the right of the boxes that require you to input a date. A calendar button also appears on the **Creditors** form on the toolbar. To input dates using the calendar:

1. Click the calendar button located to the right of the field in which you want the date to appear. The calendar appears.

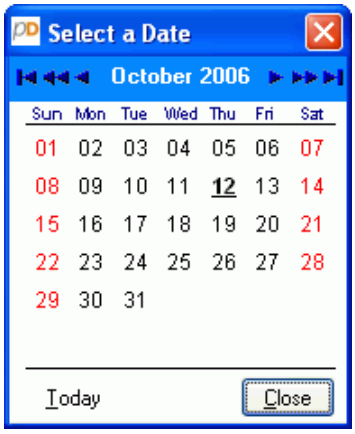



Figure 2, Calendar Tool

2. Click Today to move the date selector to today's date.
3. and - Click to move back or forward one year.
4. and - Click to move back or forward one month.
5. and - Click to move back or forward one week.
6. Use **Up** and **Down** arrow keyboard keys to move back and forward one week.
7. Use **Left** and **Right** arrow keyboard keys to move back and forward one day.
8. Use **Page Up** and **Page Down** keyboard keys to move back and forward one year.
9. Click on a date to choose it or press the **Enter** key to choose the underlined date. The window closes when you select a date.
10. Click Close to close the calendar without choosing a date.

## General Form

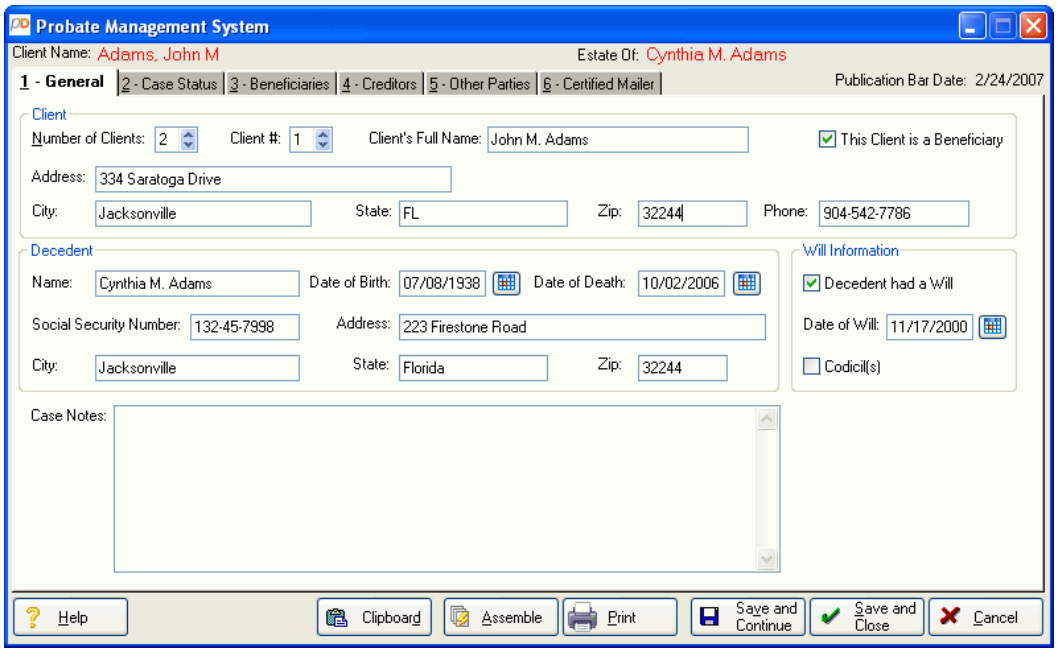



Figure 3, General Form

The first section, **Client,** asks for the number of clients in a box entitled **Number of Clients.** If you have only one client, enter the client's full name and whether or not the client is a beneficiary. Then fill out the client's mailing address and phone number. If you have more than one client, enter the number of clients in the appropriate box. In the **Client #** box, choose a number and enter information for the chosen client. If the client is a Beneficiary, make sure to check the **This Client is a Beneficiary** box.

Several fields in the remaining sections have **calendar buttons** [182]. Click **here** [182] to view detailed help on their use.

The section entitled **Decedent** asks for the decedent's name, birth and death dates, social security number and address at time of death. There is also a section to the right of **Decedent** entitled **Will Information.**

The **Will Information** section asks for information about the decedent's will. If there is a will, place a check in the box entitled **Decedent Had a Will.** Fill in the date of the will and place a check in the box entitled **Codicil(s),** provided there are any. If there is no will, and you do not place a check in the box entitled **Decedent had a Will,** the **Date of will** and **Codicil(s)** fields will be disabled.

The last field on the **General** form is entitled **Case Notes.** Enter any desired notes relating to the case.

## Case Status Form

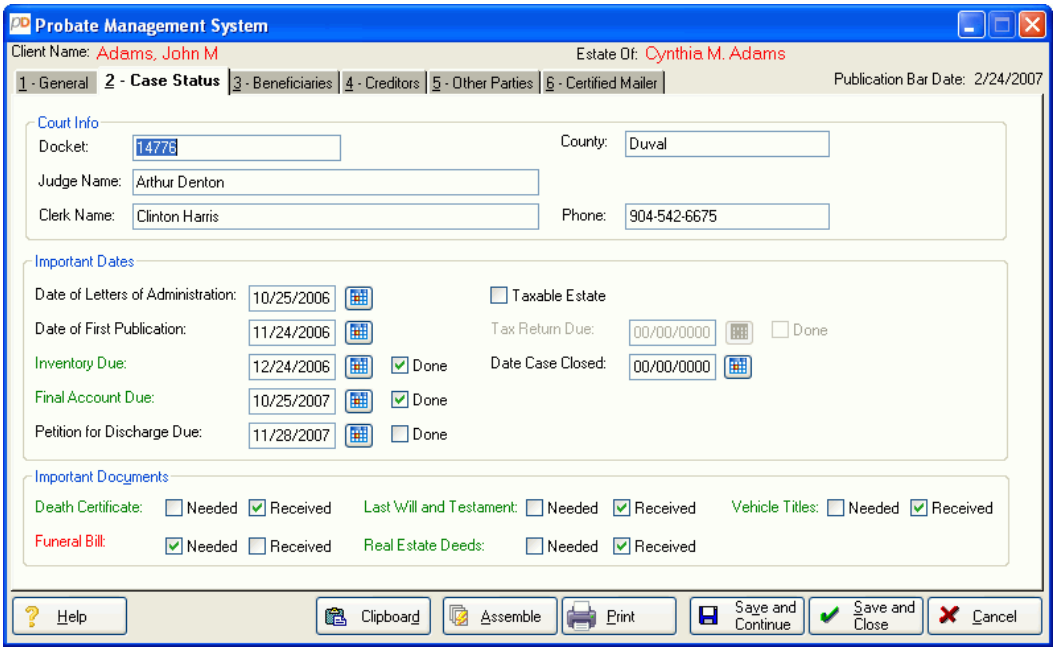



Figure 4, Case Status Form

Instructions for completing this form follow:

1. The **Court Info** section asks for the docket number, county, the judge's name and the clerk's name and phone number. Enter the appropriate information.
2. In the **Important Dates** section, enter the requested dates in the fields provided. Click **here** [182] to view detailed help on using the calendar buttons next to the fields.
   a. Note that ProDoc automatically calculates the **Inventory Due, Final Account Due** and **Petition for Discharge Due** dates based on information entered in the **Date of Letters of Administration** field.
   b. Click the **Taxable Estate** box if this case deals with a taxable estate. Adjust the date in

the **Tax Return Due** field if needed.

c. The **Date Case Closed** field is normally only completed after the administration is complete.

d. For fields with boxes titled **Done,** click the box if the item has been completed.

3. The **Important Documents** section asks if certain documents have been **received** or are still **needed.** Place a check in the appropriate box for each document. The documents that you will be tracking are the **Death Certificate, Funeral Bill, Last Will and Testament, Real Estate Deeds** and **Vehicle Titles.**

## Beneficiaries Form

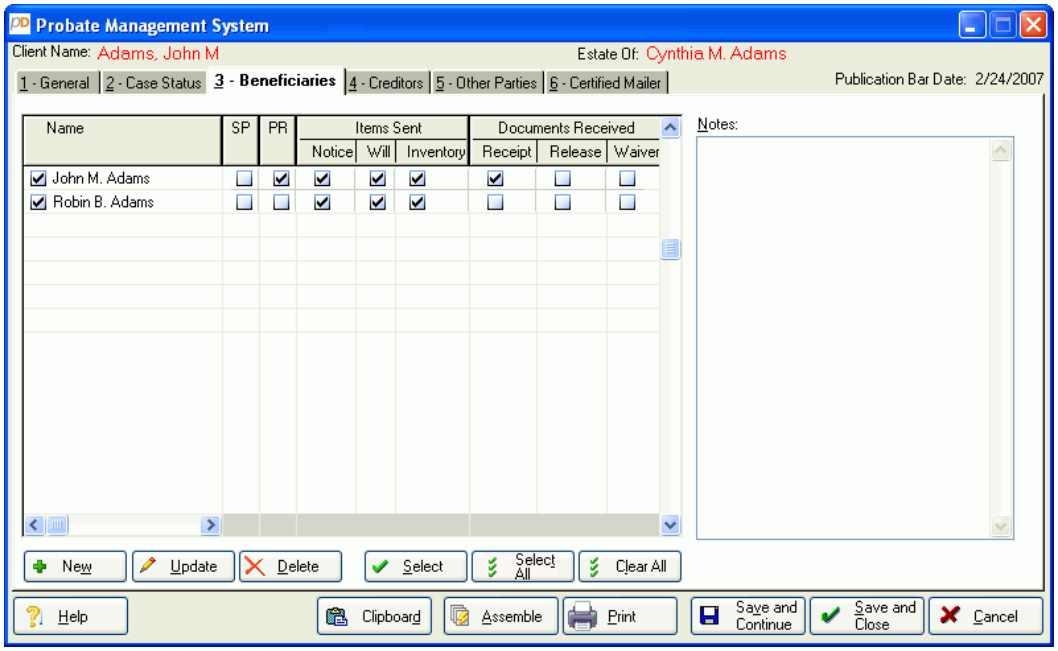



Figure 5, Beneficiaries Form

This form lists all of beneficiaries associated with your client's case. You may input new beneficiaries by clicking **New.** If you need to update a beneficiary's information, click **Update.** For each beneficiary, place a check in the **SP** column box if the beneficiary is a spouse, and in the **PR** column box if the beneficiary is a personal representative.

The box to the left of each beneficiary's name is used to select the beneficiary's information for further uses. Clicking the box places a check mark in it and indicates "selected" status; clicking the box again clears the check mark. The **Select, Select All** and **Clear All** buttons may also be used to select or deselect beneficiaries. Clicking the **Clipboard** button copies all selected parties' name and address information, in block address format, to the computer's clipboard for pasting to another location. Clicking the **Print** button enables you to print various **Selected Party** **reports** 181 which include information for any selected beneficiaries.

Other column boxes to check or leave blank for each beneficiary are grouped under **Items Sent** and **Documents Received.** Check the appropriate boxes if the **Notice of Administration, Will** or **Inventory** has been sent, and do the same if the **Receipt, Release** or **Waiver** has been received. You can create notes about a beneficiary by highlighting the desired name and typing text in the **Notes** box at the right side of the window. You can then view these notes while working in the last four forms of the program by highlighting the beneficiary's name.

# Creditors Form

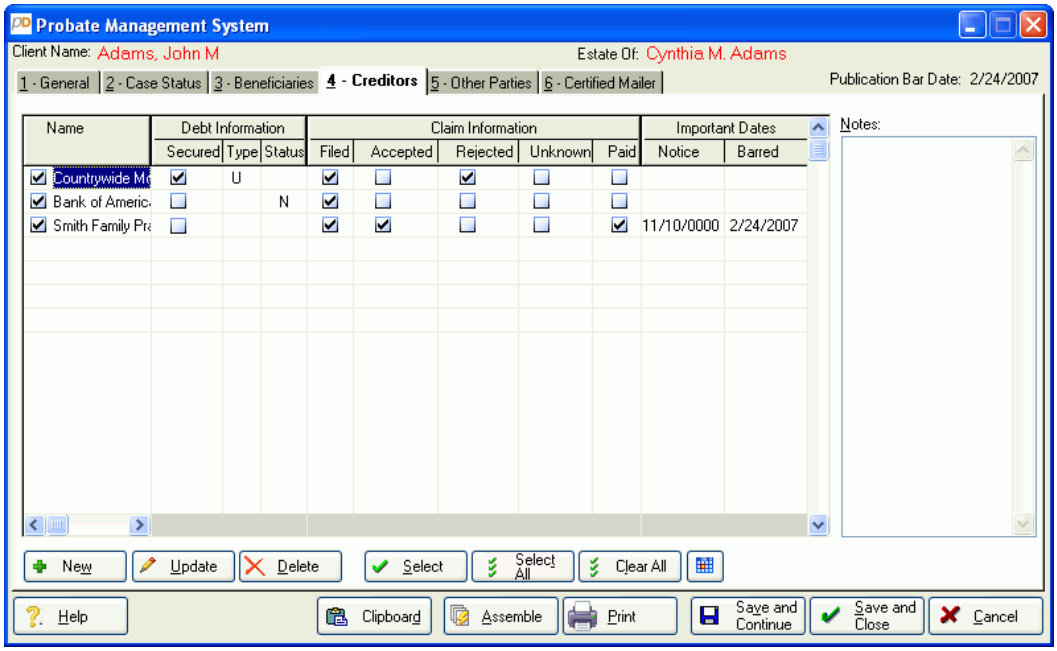



Figure 6, Creditors Form

The **Creditors** form displays all creditors' claim information. Click **New** to add another creditor. To **Update** an existing creditor, either double-click the name or click the name, then click the **Update** button at the bottom of the form. Both methods open the **Creditor Form,** where you can update the information. You can **Delete** a creditor by clicking the name, then clicking the **Delete** button.

A calendar button, , is added to the toolbar for this form, located to the right of the **Clear All** button. When entering dates in the **Important Dates** columns, you can click it to open a calendar tool which helps you easily select a date. Click **here** 182 to see detailed help for the calendar tool.

The box to the left of each creditor's name is used to select the creditor's information for further uses. Clicking the box places a check mark in it and indicates "selected" status; clicking the box again clears the check mark. The **Select, Select All** and **Clear All** buttons may also be used to select or deselect creditors. Clicking the **Clipboard** button copies all selected parties' name and address information, in block address format, to the computer's clipboard for pasting to another location. Clicking the **Print** button enables you to print various **Selected Party reports** 181.

In addition to the **Name** column, three other groupings of information are displayed on the **Creditors** form. **Debt Information, Claim Information** and **Important Dates** are all shown with their appropriate details.

**Debt Information** has three different indicators. **Debt** is shown as **Secured** or not. The **Type** of debt is shown as **Contingent (C), Un-liquidated (U), Both (CU)** or **Neither (N).** The **Status** of the debt is shown as either **Matured (M), Un-matured (U)** or **Neither (N).**

**Claim Information** has five indicators. The first indicator shows if the claim had been **Filed.** The next three indicators show whether the claim has been **Accepted, Rejected** or is in an **Unknown** status. The last indicator shows if the claim has been **Paid.**

**Important dates** displays the date when the **Notice** to Creditors was sent and the **Barred** date, which is calculated as the later of 30 days from the date that the **Notice** to Creditors was sent or the Publication bar date shown in the upper right corner of the form.

**Note**s are displayed at the far right of the **Creditors** form concerning any highlighted creditor. To display, add, change or delete information from **Notes** for a creditor, click the name of the creditor in the **Names** column to highlight it. **Notes** currently in the system for this creditor are displayed. To add or change any information simply type or delete as needed.

## Other Parties Form

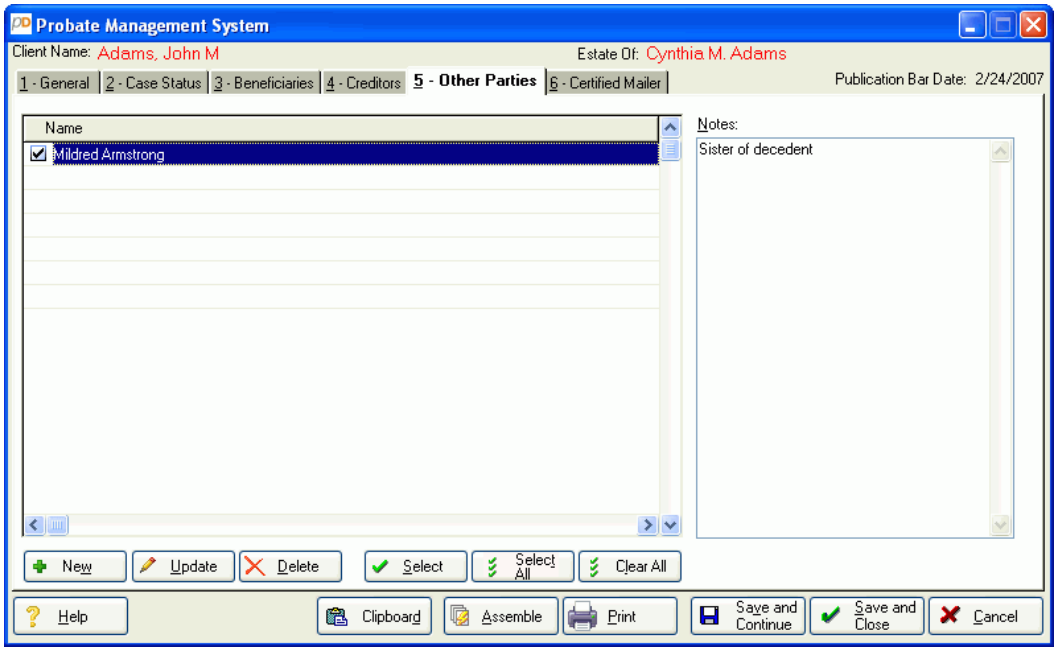



Figure 7, Other Parties Form

This form lists all of the other parties associated with your client's case. You may add new parties by clicking **New.** If you need to update a party's information, click **Update.** You can create notes about a beneficiary by highlighting the desired name and typing text in the **Notes** box at the right side of the window. You can then view these notes while working in the last four forms of the program by highlighting the beneficiary's name.

The box to the left of each party's name is used to select the party's information for further uses. Clicking the box places a check mark in it and indicates "selected" status; clicking the box again clears the check mark. The **Select, Select All** and **Clear All** buttons may also be used to select or deselect parties. Clicking the **Clipboard** button copies all selected parties' name and address information, in block address format, to the computer's clipboard for pasting to another location. Clicking the **Print** button enables you to print various **Selected Party** **reports** 181 which include information for any selected parties.

# Certified Mailer Form

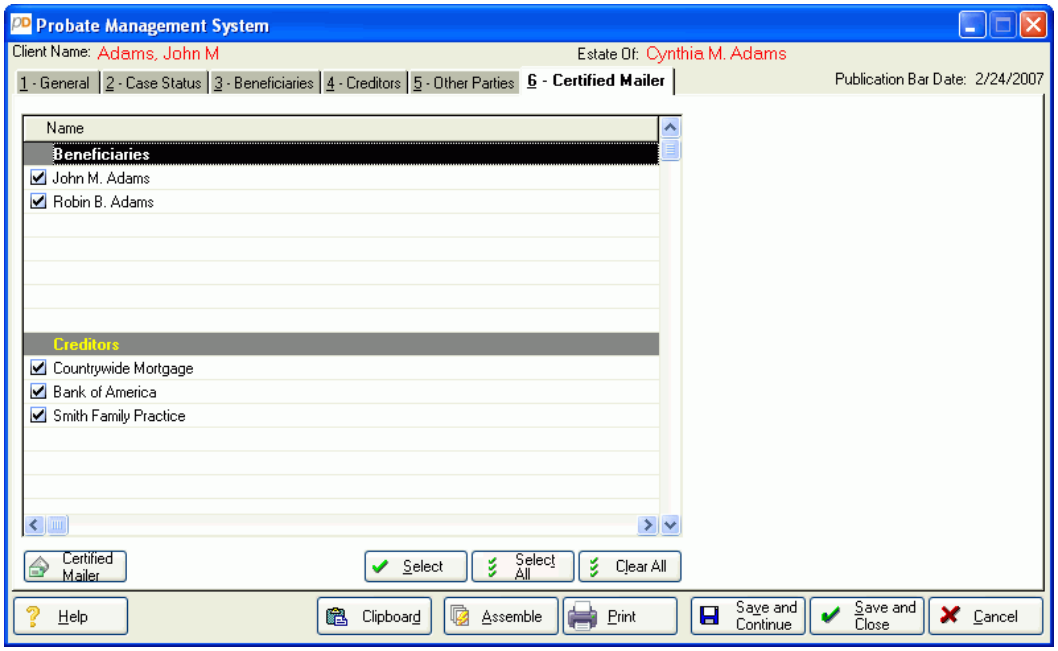



Figure 8, Certified Mailer Form

The **Certified Mailer** form is a combined listing of beneficiaries, creditors and other parties. This list is compiled from your entries in previous forms.

The box to the left of each party's name is used for three purposes: to select the party as a certified mail recipient; to select the party's information for copying to the clipboard; and to select the party's information for printing reports. Clicking the box places a check mark in it and indicates "selected" status; clicking the box again clears the check mark. The **Select, Select All** and **Clear All** buttons may also be used to select or deselect parties.

Selected parties are included automatically as certified mail recipients when you open the **Certified Mailer.** The information for parties selected on the **Certified Mailer** form is **not** included when you click the **Clipboard** button or print reports for selected parties **unless** the parties are selected on another form.

Click the **Certified Mailer** 189 button to open the **Certified Mailer.** With this tool, you can select contacts from a list and print certified mail labels for the selected contacts. Any parties already selected on the **Certified Mailer** form will be automatically listed as recipients. For details on using the **Certified Mailer,** click **here** 189.

# Certified Mailer

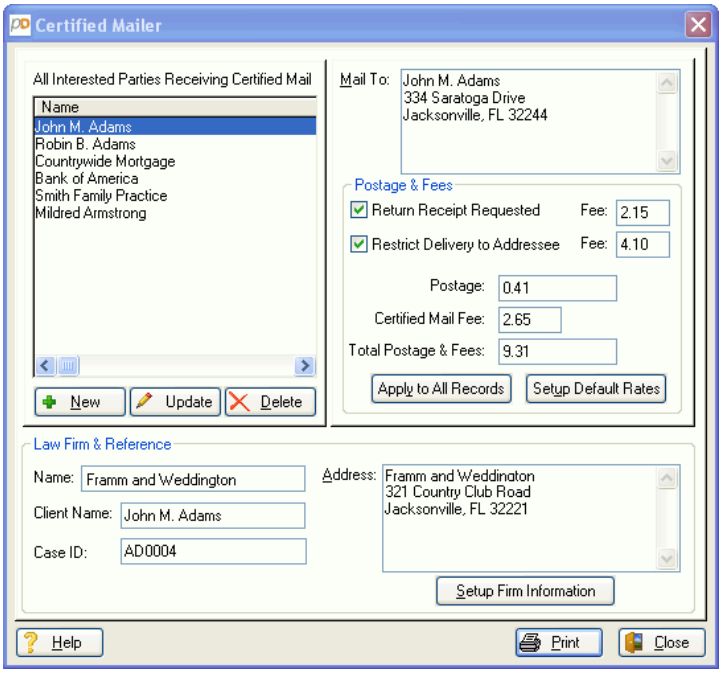



Figure 9, Certified Mailer Window

To create **Certified Mailer** labels:

1. Click the **Certified Mailer** tab to open the form.
2. You must first choose the party or parties for whom you want to create the mailers. On the toolbar you will see buttons labeled **Select, Select All** and **Clear All.** Use these buttons to make your choice(s), and then click the **Certified Mailer** button.
3. The **Certified mailer** window appears. Highlight a party listed under **Name** on the left side. The Party's address should appear in the box entitled **Mail To:.**
   a. If the desired party is not listed on one of the windows listed in Step 1, click **New** to add the party, and provide the requested information.
   b. If you want to change a party's information, click **Update** and make the desired changes.
   c. If you wish to delete a party from the **Name** section, highlight the party and click **Delete.**
4. Now you must determine the postage and fees. If the postage and fees are going to be the same for the parties you have chosen, click the button entitled **Apply to All Records** and the same postage and fees will be applied to every certified mailer you create for this session.
5. After you have completed all of the fields, you may insert special certified mailer sheets into your printer and click **Print.** The certified mailer sheet has all of the labels and cards that you will need in order to send correspondence to the chosen parties via certified mail.

To set up the **Certified Mailer** feature to print your law firm's name and mailing address on the certified mailing labels, follow the steps below.

1. In the **Certified Mailer** window there is a button entitled **Setup Firm Information.**
2. Click this button and a window titled **Setup Firm Information** appears. This window is used to setup your law firm's information so it is included on certified mailing labels. There is space provided for the firm's name, address, phone number, fax number, website address and e-mail

address.

3. Fill in the requested information and click **OK.**

After you have entered the law firm's information in the **Setup Firm Information** box, the firm's address will appear on your shipping labels whenever you send certified mail using the **Probate Management System,** and in the ProDoc forms that you assemble (if the information is relevant to the form).

Before you can use this feature, you will need to purchase certified mail shipping labels. Certified mail shipping labels are available in most office supply stores. The certified mailer program works well with Walz™ Form 35663 Certified Mailer forms.

# Glossary

## Browse for Folder

This window appears when you click the **Browse** button next to a directory dialog box. You use this window to search through folders to choose where you wish to save files.

You can navigate through the folders by using both the vertical and horizontal scroll bars on the window. You can also use keyboard navigation keys (arrow, Page Up/Down, Home, etc.) to move to different folders.

Available file system folders and drives are shown in a tree structure similar to the one used by Windows Explorer. You can click ⊞ to expand the tree for the folder/drive, or click ⊟ to contract the tree.

Double-click a folder to select it, or highlight the desired folder and click the **OK** button. Click the **Cancel** button to exit the window without choosing a folder.

## Clipboard

The Clipboard is a temporary Windows storage area for objects like text blocks. You insert text to the clipboard with the cut or copy commands. Text in the clipboard can be pasted into the document at the current location.

## Common Controls on Browse Windows

The following fields, buttons, keys, and menu items are commonly found on browse windows in ProDoc.

**Fields and Buttons**

**Add** or **New** - Opens dialog window to add a new record to the database.

**Change** or **Update** - Opens dialog window to change the details of the record which is highlighted at the time the button is selected.

**Delete** - Deletes the record which is highlighted at the time the button is selected.

**Select** - Selects the record which is highlighted at the time the button is selected.

**Keys**

**Insert** - Opens dialog window to add a new record to the database.

**Delete** - Deletes the record which is highlighted at the time the delete key is pressed.

**Menu Options**

**Close** - Closes the window and returns you to the previous window.

**Edit or Change** - Opens a drop-down menu containing options for adding, changing and deleting records.

**Help** - Calls up the standard Windows help system.

On some browse screens, you can right click on a record listing to display a floating drop-down menu with the new, update, and delete options.

## Configuration File

Configuration files let you customize your documents in ways not possible through the Formatting Options windows. Configuration files can contain headers, footers, page numbers, fonts, or any other feature you would normally put at the beginning of a document. Refer to your particular word processor's documentation to determine how to create a file containing headers, footers, etc.

When a document is assembled, ProDoc checks for a configuration file. If one or more configuration files that apply to the document exist, ProDoc inserts the highest priority configuration file into the document. If the configuration file sets the value of one of the Formatting Options items, e.g. left margin, that value will override any value set in the Formatting Options window.

There are three types of configuration files:

- The **global configuration file** applies to all documents and has the highest priority. It is stored as GLOBAL.CIF in the ProDoc home directory.
- A **volume configuration file** applies to all documents in one volume. Each file is stored as VOLUME.CIF in the subdirectory of the volume to which applies.
- A **specific document configuration file** applies to a single document. Each is stored as DOCNAME.CIF, where "DOCNAME" is the filename of the form from which the document is generated, in the subdirectory of the volume containing the form.

## Copy

Copying text is a common word processing procedure. The text is duplicated to the clipboard. From the clipboard, you can paste the text to another section of the document.

## Cut

Cutting text is a common word processing procedure. The text is removed (cut) from the document and stored in the clipboard. From the clipboard, you can paste the text to another section of the document.

## Default Answers

Default answers are automatically displayed as a proposed answer when a question is asked by ProDoc. This feature saves a tremendous amount of time for answers which are the same over and over again. One example of a default answer is the address block for a law office.

When a default answer is displayed during document assembly, you can accept it and keep going or simply type over it if the answer you want is different than the default. You can set your own default answers. ProDoc will use its logic capabilities to create default answers.

## Directory

The location where you want to save completed documents. This must include a valid drive (floppy drive or hard drive) and the subdirectories if applicable. For example, since ProDoc is normally located in the PRODOC subdirectory on your hard drive (C drive), the directory would be C:\PRODOC.

## Filename

A filename is the name of the file under which you want to save completed documents. Filenames can be as descriptive as the full name of the form, e.g. Final Divorce Decree. They can also include conventional word processor file extensions such as .doc or .wpd.

## Form Sets

Form sets are groups of related forms which are often assembled at the same time. You can define these sets of forms so that during a document assembly session, you can select a number of forms by choosing the name of the set.

## Global

Global refers to items that apply across all ProDoc volumes.

## Global Questions

Global questions are questions which apply across all ProDoc volumes.

## Highlight

Highlight means to set focus to an item that you want acted upon. On a list in a browse screen, an item is highlighted when it is in reverse color. Buttons and other items on a screen are highlighted when they are in reverse color or when a faint dotted outline appears on them. Use the up and down cursor keys to highlight an item in a browse list and use TAB and SHIFT+TAB to highlight other items on a window.

## License

License is authorization to use software on a properly registered computer under the terms of a legal agreement. Your use of ProDoc is governed by a License Agreement which spells out how the program can be used. The software can only be used by an authorized licensee under the specific limitations set forth by the License Agreement.

## Master Forms

Master forms are the text files ProDoc uses to assemble your documents. They contain paragraphs of legal text and tokens to indicate the questions you must answer. These documents are stored as word processing files and can be modified for your specific practice.

## Paste

Pasting text is a common word processing procedure. The text must be cut or copied to the clipboard. From the clipboard, the text is inserted into the document at the current cursor location.

## QuickText

QuickText allows you to store custom blocks of text to paste into answers. You use QuickText for items like an attorney's signature block where it would not be appropriate to have a default answer (as for a firm with several attorneys), but you do not want to type the information every time. Store each entry as a QuickText item and paste the data as an answer where it is required.

## Registration

Registration is usually completed when you first install and run ProDoc. Your registration will remain current as long as you use the WebUpdate feature to install periodic updates or load the updates from CD if you don't have an Internet connection. If you need to register ProDoc again, you can click the following link to view the **registration processes** 79.

## Select

You may select an item by:

1. Clicking on an item with the left button of your mouse.

2. Highlighting an item and then pressing ENTER.
3. If an item has a hot key, holding the ALT key while pressing the hot key.

## Supplemental Forms

Supplemental forms are forms which you add to a volume to extend the power of ProDoc. These forms are not included in the volume(s) provided with the program, but are created by the user for a specific purpose.

## Token

Tokens are the six character codes used to identify a question or other object in ProDoc. When ProDoc finds a token in a master form, that token tells it what question to ask, how much room to provide for the answer, etc. As an example, a token could appear in master forms as ~P1234S.

## ToolTips

ToolTips are small help balloons that appear when the cursor is placed over a control (menu, field, or button). These tips show the purpose of the control and what it will do.

## Volume

Volumes are collections of master forms and data files which are used by ProDoc. Each volume usually deals with a single area of law, such as Real Estate, Family Law, Litigation, etc. Volumes must be installed before they can be used by ProDoc.

## Volume Questions

Volume questions are questions supplied with a particular volume, such as Business Organizations or Family Law. These questions are used to assemble a document for your specific legal matter and insert the appropriate information for your client and case.

# Appendices

## Appendix A - Networking ProDoc

### Benefits

Networking with ProDoc can provide your law office with many benefits, including:

**Software Sharing** - Networking allows you to install ProDoc to a central location on your network server or host computer which permits all other computer work stations to have concurrent access to the program. By networking your computers, master forms libraries (templates), client and case data and completed documents can then be shared by all users.

**Increased Office Productivity** – With ProDoc networked, you can share client and case information by storing client data and completed documents in a central location, providing easy access for everyone networked. A central location also streamlines your backup procedure.

**Decreased Equipment Cost** – With a network, everyone in your office can share printers, fax machines, modems and CD-ROM drives. For example, if your firm has two attorneys, two secretaries, and an office manager, you might need three printers, one for each attorney / secretary and one for the office manager. A network also allows you to extend the useful lives of older PCs by providing access to newer PCs and their associated peripherals.

### Drawbacks

Networking does have some drawbacks. Two of the more obvious ones are:

**Cost** – Expenses to network a law office can be higher than usual depending on how sophisticated a network you want to create.

**Knowledge** – Networks require greater expertise to set up and maintain than stand alone personal computers. Is there someone on your staff with networking skills or who is willing to learn? If not, can you afford to hire someone with networking knowledge?

### Types of Networks

There are two fundamental types of networks, peer-to-peer and client-server. Each type has its own capabilities and limitations. Which type of network you elect to use depends primarily on your firm's size, requirements and budget. ProDoc is compatible with both peer-to-peer and client-server networks as discussed on the next page.

**Peer-To-Peer Networks** - In a peer-to-peer network set up, one computer will serve as a "Host" computer on which ProDoc is preferably installed. A peer-to-peer network is a good choice when you have only a few computers, you do not expect your network to expand in the near future, your budget is restricted, and security is not an issue. Each user does the day-to-day administration at their computer. There is no central administration to maintain and a relatively low level of security. The cost of setting up a peer-to-peer network is also minimal. You need not purchase a dedicated network operating system, a server. All that's needed is a network interface card for each computer, a network hub and sufficient network cable to physically link all computers together. It is recommended you use Windows 98/ME/2000/XP/Vista or NT workstation 4.0. Peer-to-peer networks normally require less administration. The only drawback is an increased potential for slower data exchange rate between the workstation and the host computer. Your local computer technician can probably assist you in setting up this type of network.

**Client-Server Networks** - This is the more sophisticated type of networking environment. A sole dedicated computer acts as the "network server". The computers networked to it act as "clients". ProDoc is preferably installed only on the server. A common misconception is that you must purchase a large powerful computer marketed as a server. While that is sometimes true, small networks may only require a reasonably capable PC running a server version of a networking operating system such as Windows NT or Novell NetWare. It is the job of the dedicated network server (sometimes called a "file-server" or "Application-Server") to keep track of all users and validate their log on requests. The server stores most, if not all, applications and data files, provides centralized administration for the network, and a higher level of security for your programs and files. In a client-server network, all users must initially log on to gain access to the server. A network administrator can assign permissions to users so that they only gain access to the resources they need. This protects your information from unauthorized access. Otherwise, people might attempt to gain access to confidential files on your computer via the network. This type of a network is usually more expensive to install. In addition to network cards, a network hub and cables, you will need to purchase a network operating system such as Windows NT or Novell NetWare. It is highly recommended that you consult a network specialist for assistance for this type of network.

## Preferred Network Installation Configuration

If your office computers are networked, we recommend you install ProDoc on your network server or "Host" computer.

For a client-server network, ProDoc should normally be installed only on the dedicated network server. For a peer-to-peer network, ProDoc should be similarly installed only on the computer you have designated as the Host computer.

Each Windows client workstation or peer computer should have a shortcut icon on its Windows desktop to start ProDoc. Refer to "Setting Up User Workstations", discussed later in this appendix, for assistance with creating shortcuts and icons.

This installation method creates a centralized database for storage of client and case information and data files. It also permits all network users to access Client/Case information entries made by other networked users. This eliminates duplication of data on individual workstations and ensures all documents are centrally located and contain consistent information for each client and case. A ProDoc network installation is also the simplest to keep current, since periodic ProDoc update releases only need to be installed once to the server or host computer.

**NOTES:**

- ProDoc is normally installed to a mapped shared network drive location such as F:\ProDoc. Optionally, you can install ProDoc under a Universal Naming Convention (UNC) scheme where computer names are substituted for a drive letter, for example \\GEORGE\PRODOC. Contact your network technician if you are uncertain about how your network is configured.
- ProDoc will work properly when deployed on Citrix and Linux based servers.

## Installing and Configuring ProDoc on a Network

**Step 1 - Install the program.** Begin by installing ProDoc on the network server or host computer. Insert the CD and follow the prompts. If needed, consult the procedures in Chapter 1 of this manual.

**NOTES:**

- These procedures apply to new customers and to those customers migrating from stand-alone to a network installation. Previous users who have saved ProDoc data should follow these procedures,

then consolidate data as explained later in this appendix.

- Normally, you should only install ProDoc to a single location on the server or host computer. There is no need to separately install ProDoc on any of the other client or peer workstations. However, you may want to separately install it to a laptop or other non-networked computer.

**Step 2 - Establish user access.** Before ProDoc can be used, it must be "shared" with the other computers on the network. All users must have full access (read and write) to the computer/directory in which ProDoc is installed. Likewise, if completed documents are to be saved to a central directory on a network drive (preferred), all users must also have full access to that directory. Contact your local network professional for assistance.

**Step 3 - Create workstation shortcuts.** To enable networked users to run ProDoc from their workstations, you must create a shortcut (under Windows 98/ME/NT/2000/XP/Vista) on each workstation.

1. **Right click** anywhere in the middle of the workstation desktop.
2. From the menu, click **New** and then click **Shortcut.**
3. In the Create Shortcut dialog box, enter the Command line where ProDoc is installed. For example:**X:\PRODOC\PROWIN.EXE** (where **X** is the network drive letter where the program directory and files are located). Alternatively, you may click the **Browse…** button to browse to the correct location. Then, click **Next.**
4. In the dialog window, enter "ProDoc" as the name for the shortcut and click **Finish.**
5. To start ProDoc, simply **double click** this shortcut.

**Step 3 - Run ProDoc for the first time.** When starting ProDoc, you will be asked to enter your initials or login name. This is necessary in order to establish new operating parameters or access existing parameters for each network user. The first user who runs ProDoc is automatically assigned as a Supervisor. See the **Manage User Login** 13 section which explains this menu item. Supervisors can designate others as Supervisors or Users and manage various user settings.

Follow the prompts on succeeding windows to complete other setup options (described in Chapter 1).

If you are a new user with no ProDoc data or other installations, you are finished.

## Migrating from Stand-alone Installations to a Network Installation

If you have established a network in your office but are still using one or more stand-alone installations, simply install ProDoc on your server or host computer. If you do not yet have a network but are planning to establish one, you will first need to decide on certain hardware and software alternatives. We recommend that you seek assistance from a computer technician in your area with networking experience.

Once you install ProDoc on your server or host computer, you will need to transfer your client/case files (if any exist) to the ProDoc directory on the server, uninstall all previous installations and create desktop shortcuts on each of the workstations as follows:

1. Follow the steps above to install ProDoc to the network server or host computer and configure workstations.
2. Double click the ProDoc shortcut icon. You will most likely receive a message indicating that ProDoc's location may have changed and asking if you want to use the old or new location. Click **OK** to open ProDoc from its new location.
3. In order to continue to use previously created client/case information, that data must be consolidated into the server's ProDoc directory. You do this by using ProDoc's **Database Transfer,** discussed in Chapter 3, as follows:

- Have your network administrator map each applicable workstation with a unique drive letter.
- Log on to ProDoc on the server from one of the workstations.
- Click **Tools** from the main screen menu, then **Database Transfer** and select **Transfer Client Data In.**
- Browse to the correct previously mapped workstation drive and double click the ProDoc directory where you will be transferring data from and click **OK**.
- The **Select Clients** window will appear listing all of the clients stored in that workstation's ProDoc directory. Normally you will click the **Select All** button and click **OK**. This will transfer all client and case information to the server's ProDoc directory. However, if you would like to selectively transfer clients, simply select the clients you want to transfer and then click **OK**.
- The client information will start transferring to the server. Please be patient as this procedure can take considerable time, depending on the size of your client list.
- You will receive a screen message when the transfer is complete. Click **OK** to return to the ProDoc main window. Repeat these steps as necessary for other applicable workstations.

  **NOTE:** The client/case transfer process can become complex when attempting to consolidate data for clients that exist on two or more computers. ProDoc may ask you whether two clients or two cases are really the same client and case. Carefully read the information in the question window before answering.

- Start ProDoc on the server, click **Clients & Cases** and then **Client/Case Manager** to inspect your client and case data base to make sure it is intact and includes all of the client/case data from your other installations. After verifying the data, assemble a simple document with client and case information to make sure the program is fully operational and that completed documents are saved to the desired location, preferably to a central location on the server.
- When you are confident of your new network installation, it should be safe to delete ProDoc from each workstation where it had been previously run. We recommend that you manually delete the entire ProDoc directory from the workstation's local drive by highlighting it in Windows Explorer and pressing the **Delete** key. You should also delete the ProDoc group from the C:\Windows\Start menu\Programs directory, since you will be starting ProDoc from the windows desktop shortcut.

## Appendix B - How ProDoc Works

**THE ASSEMBLY PROCESS**

ProDoc assembles documents in a two-phase process. During the first phase, called the assembly phase, ProDoc asks questions and then uses the answers to "cut and paste" the appropriate clauses, paragraphs and words together to create the basic document. In the second phase, ProDoc asks fill-in-the-blank questions then inserts the answers into the assembled document. This is a general description, but there are exceptions to this scheme.

**MASTER FORMS**

The basic forms that ProDoc uses during the assembly process are called master forms (templates). This is a standard word processing document, which contains special codes called tokens in places where questions are to be asked or text is to be inserted, or at the beginning or end of blocks of text.

**SUPPLEMENTAL FORMS**

When you subscribe to a ProDoc volume, it contains master forms (templates). You may also add your

own forms to ProDoc as supplemental forms. The process of creating your own supplemental forms is discussed in **Appendix D** 221 of this manual.

**OBJECTS**

An object is a set of instructions which tells ProDoc to ask a question, insert text, perform a calculation, etc. Most of these objects are stored in database files. There are five basic types of objects used in ProDoc:

**Questions** - Question objects tell ProDoc to ask a question. There are two categories of questions - assembly questions and merge questions. Assembly questions are processed during the assembly phase and the answers are used to determine what clauses, paragraphs and words to insert into and delete from the document. Merge questions are normally processed during the second (merge) phase. Their answers are usually merged into the document. On occasion, a merge question may be asked early in the assembly phase when the information is needed earlier for some special purpose.

**Processors** - Processor objects tell ProDoc to calculate a value, manipulate pieces of text to create something different or to import a text file into the current document. There are assembly phase processors and merge phase processors.

**Delete** - Delete objects tell ProDoc to delete blocks of text if a particular condition exists. For example, if the user answers a question indicating they do not want a particular provision in the document, the delete object will omit the corresponding clause from the document. Delete objects are processed during the assembly phase.

**Loop** - Loop objects tell ProDoc to repeat sections of the master form if a particular condition exists. For example, a loop object may check to see how many sellers there are on a deed and then loop that many times creating one signature line for each seller.

**Special** - There are two objects, which do not contain instructions in a database. They are processed internally by ProDoc to perform a specific task. These objects are formatting objects and numbering objects. Formatting objects are used to tell ProDoc to use certain formatting characteristics such as line spacing and margin settings. Numbering objects are used for automatically numbering paragraphs in a finished document.

Most objects include logical instructions which ProDoc processes in order to determine what to do. For example, question objects often include logic, which determines whether to show a default answer and delete objects always include logical instructions, which determine whether or not to delete text.

**TOKENS**

When ProDoc is processing a master form, it is looking for tokens. You can think of tokens in the same manner as you think of simple merge codes you would use in WordPerfect or Word, except that they are much more flexible and powerful. When ProDoc finds a token, it looks for a matching object in the database file and then performs the instructions stored in that object. As mentioned above, the objects tell ProDoc when to ask a question, perform a calculation, delete or insert text or run a script. There are no special keys or techniques required to create a token. A token is simply a six-character word with a tilde (~) in front of it that you type into the form. A typical token would look like ~P1000V.

The first character in a token tells ProDoc what kind of object it represents. The most common types of tokens are:

**A** - assembly questions (for example ~A1000V)

**P** - merge questions (for example ~P1000V)

**I** - assembly insert (for example ~I1000V)

**M** - merge insert (for example ~M1000V)

**C** - calculator assembly (for example ~C1000V)

**D** - delete (for example ~D1000V)

**E** - end delete (tells ProDoc where to stop deleting (for example ~E1000V)

**L** - repeat a section of the master form (for example ~L1200V)

**ELOOP** - end of the master form section to be repeated (~ELOOPV)

**F** - format instruction (for example ~FLNSPV is a line spacing instruction)

**N** - auto numbering instruction (for example ~NR001V)

To summarize, a token is simply a name that ProDoc uses to locate the corresponding object (instructions) in its database. The first character in the token tells ProDoc what kind of object it represents.

**VOLUMES**

ProDoc provides a simple method for organizing your master forms into a useful forms library. Forms are grouped together in sets called volumes. A volume normally contains forms for a specific area of law or subject, such as real estate, family law, corporations, etc. This method of grouping forms together by subject makes it much easier to find and maintain those forms. A ProDoc system can contain an unlimited number of volumes.

**SCOPE**

A large ProDoc system may contain many volumes and many thousands of objects. If all objects for all volumes were stored in a single database, it would become an extremely large database and it would be very difficult to manage. When the volume is installed, all of the forms as well as the object database files are copied into a separate directory just for that volume. An example of an object that applies only to a particular volume would be the name of the seller in a real estate transaction. This information is only relevant to the real estate volume - it would not be useful in an adoptions volume. Therefore, that object is stored in the real estate volume's directory so that when ProDoc is assembling a deed it looks in the real estate directory for the database which contains the instructions. This type of object is said to have a volume scope.

Sometimes, however, there are certain questions or instructions, which will always be the same, no matter which volume you are assembling. An example of this would be a law firm's name. It doesn't matter whether you are preparing a will or a deed, the law firm's name will be the same in each of those two volumes. This type of object is said to have a global scope. When ProDoc processes a global object, it looks in the main ProDoc directory for the database which contains the appropriate instructions. The benefit of this mechanism is that, when you are producing forms from more than one volume in a single case, you will only have to enter the law firm's name one time instead of once for each volume you are using.

In addition to volume and global objects, you can also have supplemental objects. A supplemental object is volume specific but it is an object created by you. Your objects (questions) are stored in separate databases so that you do not have to worry about interfering with objects, which were shipped to you as part of a volume.

When ProDoc finds a token in a document, it looks at the last (sixth) character to determine what scope the object is and therefore which database to search for instructions. The three possibilities are V for volume objects, G for global objects and S for supplemental objects.

**THE ASSEMBLY PHASE**

The assembly phase is the initial processing stage where ProDoc processes some initial questions and then cuts and pastes text in the master form in order to create an interim form which contains all of the necessary text and clauses needed for the final document. The questions to be asked and other objects to be processed during this phase are contained in a database list, which is created for each master form.

After this list of objects has been processed, ProDoc begins scanning the master form for additional objects to process.

Delete objects: When ProDoc finds a delete object, it checks to see how a question was answered or whether some other condition exists and it determines whether to begin deleting text from the form. If text is to be deleted, ProDoc begins cutting text out of the master form one character at a time. ProDoc does not stop deleting text until it finds the appropriate end delete token which stops the deletion process.

Processor objects: When ProDoc finds a processor object, it checks to see how a question was answered or whether some other condition exists and it determines whether to insert text into the form. For example, it may check to see whether the Plaintiff is male or female and then insert the proper object (him or her) into the document.

Most questions asked in the assembly phase are assembly questions (~A), which are used to determine what clauses, paragraphs, nouns, etc. are to be inserted into or cut out of a document. An example of this would be a question asking the user to select any special provisions he wants in the document or asking what is the gender of the plaintiff. Occasionally, however, the author of a volume may include merge questions (~P) in the assembly phase question list. The most common reason for doing this is to get an answer that will be used in the text of a subsequent question. For example, What is the name of the Petitioner? ANSWER: Jane Doe, and then How many children does Jane Doe have?. It is sometimes helpful to include the person's name in the text of a question and the only way to have that name available is to ask for it with a preceding question.

In volumes, which are subscription items, assembly questions are always contained in a separate database list. Assembly question tokens (~Axxxx) however, can be contained at the very top of a master form. If ProDoc finds an assembly question token at the beginning of a master form, it will ask that question during the assembly phase. This feature allows you, the user, to use our assembly questions in your own forms even though you do not have access to the assembly phase question list.

Here's how this feature can be very useful. Suppose you are creating a supplemental form in which you would like to use one of our volume codes (say ~I0001V) which inserts either him or her in the document. You can use this code and, if you have already produced a regular document which processes an assembly question asking if the plaintiff is male or female (say ~A1000V), then the insert code will work just fine.

On the other hand, if you have not previously created a document, which asked this question, then your supplemental form won't be able to determine which pronoun to insert. To solve this problem, you can insert the assembly question token at the very beginning of your supplemental form. When ProDoc processes the form, it will check to see whether the question has already been answered and, if not, it will ask the question.

**THE MERGE PHASE**

When ProDoc reaches the merge phase, it has created an intermediate form which is the same as the final assembled document except that it lacks fill in the blank information. ProDoc then asks the fill-in-the-blank questions to get the missing information.

You can select whether you want to see the intermediate form during the merge phase. Normally, users elect to have the intermediate form displayed as ProDoc jumps to each merge question and stops for the user to fill in the blanks. Some users, however, prefer to have ProDoc not show the form and instead simply pop up the questions as the tokens are found.

After all of the blanks are filled in, the document is completed and ProDoc stores it on disk in the directory selected by you.

## MISCELLANEOUS CONSIDERATIONS

For technical reasons, ProDoc has been designed to process ASCII, WordPerfect® 5.x or WordPerfect 6.x

text files only. That means that if you edit a master form or create a supplemental form and save as a Microsoft Word file, ProDoc will have to convert it to a WordPerfect file before processing. ProDoc performs this conversion automatically without the user even knowing it has happened. This process works very reliably but it does take a few seconds each time the conversion is performed. Therefore, if speed is important to you, you would do better to save the master form or supplemental form as a WordPerfect 5.x or 6.x type file.

**Formatting master forms (templates) - (~F tokens)**

Formatting a master form to work consistently can be problematic. Consider a situation where you normally use 1" margins with line spacing of 1.5. In one form, you need to indent a section to 2" margins with line spacing set to 1. At the end of that indented section, you reset margins to 1" and line spacing to 1.5.

When ProDoc begins processing a master form, it memorizes the formatting settings that are in effect at the beginning of the form. Whenever ProDoc encounters a formatting token, it inserts the original setting into the document at that location. Just think of this as a way to restore the original formatting settings, whatever they are. In the example above, instead of putting the 1" margin and 1.5 line spacing settings in the master form, type in ~FLNSPV~FLMARV~FRMARV to reset line spacing and margins to the original setting.

ProDoc's formatting tokens are:

FLNSPV - line spacing
FLMARV - left margin
FRMARV - right margin
FTMARV - top margin
FBMARV - bottom margin
FFONT - font
FJUST - justification

**Paragraph Numbering**

Volumes purchased from Thomson Reuters do not use WordPerfect's or Microsoft Word's auto numbering capabilities. This is because our forms are used with a wide variety of word processors and auto-numbering codes simply don't convert between the different formats very reliably. Instead, ProDoc uses its own auto numbering mechanism. Our auto numbering tokens begin with ~N as follows:

~NRxxx - number with roman numerals (I, II, III, etc
~NAxxx - number with arabic numbers (1, 2, 3 etc.)
~NCxxx - use capital letters (A, B, C, etc.)
~NLxxx - use lower case letters (a, b, c)

## Dimensioned Questions

In early versions of ProDoc, we couldn't simply ask, "How many children are there?" and then loop through and ask for the names for however many children were indicated. Instead, what we had to do is give the user a choice between a limited range such as 0, 1, 2, 3 or 4 children. We would then create separate objects for child 1, child 2, child 3 and child 4. Beginning with version 2.0, however, we now have what are called dimensioned objects, which can hold multiple answers. (For you programmers, these are arrays.) In the above example, we could use a single dimensioned object to hold the names of all the children. The benefit to this method is that we no longer have to limit the number of children to a preset maximum such as 4.

To use a dimensioned object, it must be placed in a loop structure. Loop structures begin with an L token, end with an ELOOP token, and may contain text and tokens in between. The L token is tied to an assembly phase token that indicates how many times the loop should repeat. For example, if the user says there are 5 children, then the loop would repeat five times, asking for the names of the first child, second child, third child, fourth child and fifth child.

A loop structure like the one below could be used to list the names and birth dates of several children in a document. In this example P1508V and P1514V are dimensioned objects that ask for and store the names and birth dates, respectively, of multiple children. L1500V is tied to an assembly phase token that asks how many children there are. Generally the assembly phase token is a token with the same number as the L token. In this case that would be A1500V.

~L1500V
**Name of the Child:** ~P1508V
**Date of Birth:** ~P1514V
~EL00PV

The questions asked in this example would be as follows. First would be the A1500V question, which might be "Number of children affected by the suit:". Assume the user answers "2". Next would be "Name of the 1st child:" (assume the answer is "Ann", then "Birth date of Ann:" (assume the answer is "January 1, 1991"), then "Name of 2nd child:" (assume the answer is "Bob"), then "Birth date of Bob:" (assume the answer is "February 2, 1992"). The text appearing in the assembled form for the loop structure for these answers would be as follows.

Name of child: Ann
Date of Birth: January 1, 1991

Name of the child: Bob
Date of Birth: February 2, 1992

In the bulk of the Family Law forms, only one petitioner is possible, but a dimensioned object, P1208G, is used to hold the name of the petitioner. If ~P1208G appears in a form, it must be in a loop structure even though there will be only one petitioner. There are no exceptions to the rule that a token in a form for a dimensioned object must be in a loop structure. The L token for the number of petitioners is L1200G. So, to insert the petitioner's name in a form using P1208G, use the loop structure ~L1200G~P1208G~EL00PG rather than ~P1208G.

## SAMPLE ASSEMBLY SESSION

### Assembly Questions

The first step in an assembly session is to ask a series of questions and perform calculations necessary to do the initial cutting and pasting which creates the form. The tokens for these questions and calculations are contained in a list, which is stored in a database file. A sample list is reproduced below:

**C0001G** - calculator that transfers client's name from Client/Case Manager

**P9005G** - Question: County where the action is pending. (Some counties have local requirements)

**A0100V** - Question: Describe your client:

**A1200G** - Question: How many petitioners are there:

**L1200G** - loop once for each petitioner

**CPETIV** - calculator that transfers client data from Client/Case Manager

**P1208G** - Question: Petitioner's full name:

**P1240G** - Question: Petitioner's birth date:
**A8605V** - Question: Describe the Petitioner:
**ELOOPG** - end of loop
**A1300G** - Question: How many respondents are there:
**L1300G** - loop once for each respondent
**CRESPV** - calculator which transfers client data from the contact manager
**P1308G** - Question: Respondent's full name:
**P1340G** - Question: Respondent's date of birth:
**A8610V** - Question: Describe the respondent:
**ELOOPG** - end of loop
**A1500V** - Question: Number of children affected by this suit:
**L1500V** - loop once for each child
**P1508V** - Question: Name of the [1st, 2nd, 3rd...] child:
**P1514V** - Question: Birth date of the child:
**ELOOPV** - end of loop
**A2000V** - Question: Select a domicile provision:
**A2005V** - Question: Select type of Service for Original Petition:

This is only a partial reproduction of the assembly question list for the Original Petition for Divorce. There are many more items in the complete list.

ProDoc works through this list and processes the tokens just as if they were found in the master form. Notice question A1200G, which asks how many petitioners there are. This question has logic attached to which automatically assigns "1" as the answer when you are creating divorce documents because there can only be one petitioner in a divorce. The question must be in the list, however, because the answer to this question determines how many times to process the following loop.

**Assembling the Form**

After the assembly phase question list has been processed, ProDoc begins processing the master form. This task involves scanning the form looking for assembly phase tokens. As each token is found, it is processed, which causes ProDoc to cut or paste text into the form. When this cutting and pasting is completed, ProDoc has created the form which contains all of the pronouns, paragraph numbers, clauses, paragraphs and provisions which are needed for the completed document. This intermediate form still contains fill-in-the-blank tokens, which will be processed, in order to fill in the blanks during the following merge phase. A sample page from a master form before the assembly phase and one from the form after the assembly phase is reproduced on the next pages:

## *This master form is filled with assembly and merge phase tokens:*

~I0001V

~FLNSPV **Original Petition for Divorce ~FFONTV**

~FLNSPV~NA001V. Parties

~L1200GThis suit is brought by ~P1208G, Petitioner, who is ~P1241G (~M1204G) years of age and resides at ~P1215G, ~P1218G, ~P1222G.~ELOOPG ~L1300G~P1308G, Respondent, is

~P1341G (~M1304G) years of age and resides at ~P1315G, ~P1318G, ~P1322G.~ELOOPG

~NA001V. Domicile

~D2009V ~I2000V has been a domiciliary of Texas for the preceding six-month period and a resident of this county for the preceding ninety-day period.

~E2009V~D2000V Petitioner is domiciled in another state or nation. Respondent has been a domiciliary of Texas for at least the last six months and a resident of this county for the preceding ninety-day period.

~E2000V~NA001V. Service

~D2002V Process should be served on Respondent at ~L1300G~I2002V~ELOOPG.

~E2002V~D2004V No service on Respondent is necessary at this time.

~E2004V~D2006V Citation of Respondent by publication or other substituted service is necessary for the reasons stated in the attached affidavit.

~E2006V~D2012V~NA001V. Long-Arm Jurisdiction

~D2008V~D2014V Respondent is a nonresident of Texas. Petitioner is a resident or a domiciliary of Texas at the commencement of this suit. Texas is the last state in which marital residence between Petitioner and Respondent occurred, and this suit is commenced within two years after the date on which marital residence ended.

~E2014V~D2016V ~P2024V

~E2016V~E2008V~D2010V~D2018VThe child~I2004V the subject of...

***The form that follows is an example of an intermediate form in which all of the assembly phase tokens have been processed and the only remaining tokens will be processed in the merge phase. Notice that all of the unwanted clauses and paragraphs have been stripped out and paragraph numbers and pronouns have been inserted. This intermediate form is created internally by ProDoc and it is displayed to you while you are filling in the blanks during the assembly process.***

**NO. _____**

| | | |
|---|---|---|
| **IN THE MATTER OF** | ' | **IN THE DISTRICT COURT** |
| **THE MARRIAGE OF** | ' | |
| | ' | |
| **[insert list of PETITIONERS]** | ' | **_____ JUDICIAL DISTRICT** |
| **AND** | ' | |
| **[insert list of RESPONDENTS]** | ' | **[insert county] COUNTY, TEXAS** |

**Original Petition for Divorce**

1. Parties

This suit is brought by JOHN DOE, Petitioner, who is ~P1241G years of age and resides at ~P1215G, ~P1218G,~P1222G. JANE DOE, Respondent, is ~P1341G years of age and resides at ~P1315G,~P1318G,~P1322G.

2. Domicile

Petitioner has been a domiciliary of Texas for the preceding six-month period and a resident of this county for the preceding ninety-day period.

3. Service

Process should be served on Respondent at ~P1315G,~P1318G,~P1322G.

4. Protective Order Statement

No protective order under chapter 71 or section 3.581 of the Texas Family Code is in effect, and no application for a protective order is pending with regard to the parties to this suit.

5. Dates of Marriage and Separation

The parties were married on or about ~P2038V and ceased to live together as husband and wife on or about ~P2040V.

6. Grounds for Divorce

The marriage has become insupportable because of discord or conflict of personalities between Petitioner and Respondent that destroys the legitimate ends of the marriage relationship and prevents any reasonable expectation of reconciliation.

7. Children of the Marriage

There is no child born or adopted of this marriage, and none is expected.

8. Division of Community Property

Petitioner believes Petitioner and Respondent will enter into an agreement for the division of their estate. If such an agreement is made, Petitioner requests the Court to approve the agreement and divide their estate in a manner consistent with the agreement. If such an agreement is not made, Petitioner requests the Court to divide their estate in a manner that the Court deems just and right, as provided by law.

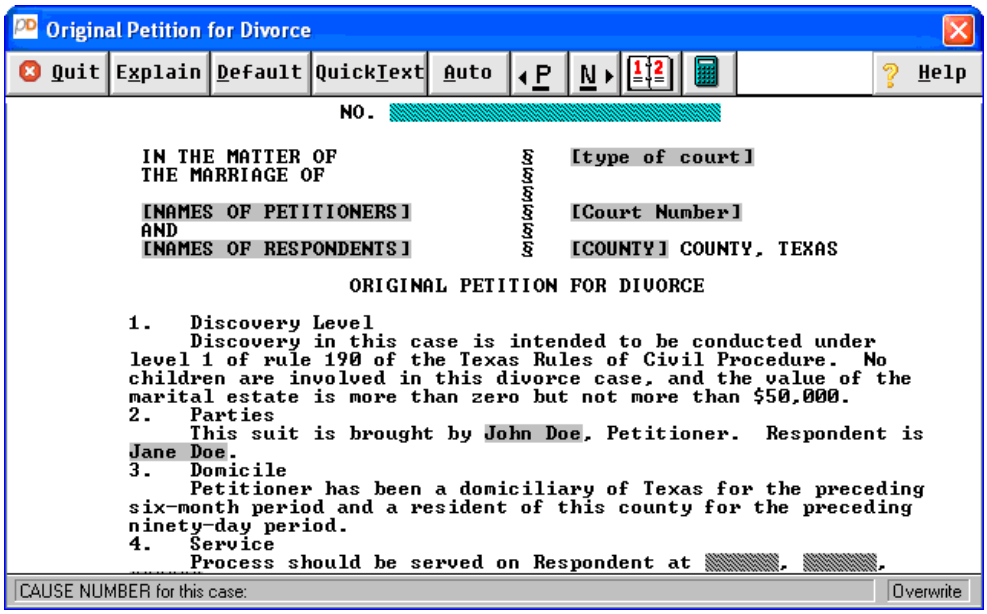
9. Statement on Alternative Dispute Resolution

Petitioner has signed a statement on alternative dispute resolution, which is attached as Exhibit ~P2072V.

10. Prayer

```
   Petitioner prays that citation and notice issue as required by law and that
the Court grant a divorce and all other relief requested in this petition.
```

**An example follows of how this interim form appears during the merge phase:**


Original Petition for Divorce
Quit
Explain
Default
QuickText
Auto
P
N
Help
NO.
IN THE MATTER OF
THE MARRIAGE OF
[NAMES OF PETITIONERS]
AND
[NAMES OF RESPONDENTS]
§ [type of court]
§
§
§ [Court Number]
§
§ [COUNTY] COUNTY, TEXAS
ORIGINAL PETITION FOR DIVORCE
1. Discovery Level
Discovery in this case is intended to be conducted under level 1 of rule 190 of the Texas Rules of Civil Procedure. No children are involved in this divorce case, and the value of the marital estate is more than zero but not more than $50,000.
2. Parties
This suit is brought by John Doe, Petitioner. Respondent is Jane Doe.
3. Domicile
Petitioner has been a domiciliary of Texas for the preceding six-month period and a resident of this county for the preceding ninety-day period.
4. Service
Process should be served on Respondent at
CAUSE NUMBER for this case:
Overwrite

## ANALYSIS OF A MASTER FORM

The following is a reprint of the first page of a master form for a Notice of Hearing For Temporary Orders.

```
~I0001V


                  Notice of Hearing for Temporary Orders ~FFONTV


~FLNSPV  ~L1300GNotice is given to Respondent, ~P1308G~ELOOPG, and Respondent is
ORDERED to appear in person before this Court in the courthouse at ~P2450V,
Texas, on                                                  at
          m.

   ~D1500VThe child~I2004V the subject of this suit ~I2003V ~M1504V.

~E1500V~D2320V One of the purposes of the hearing is to determine whether the
temporary injunction prayed for should be granted to enjoin Respondent from the
following:

~E2320V~D2322V~D2260V   ~NA001V. Communicating with Petitioner in person, by
telephone, or in writing in vulgar, profane, obscene, or indecent language or in
a coarse or offensive manner.

~E2260V~D2262V ~NA001V. Threatening Petitioner in person, by telephone, or in
writing to take unlawful action against any person.
```

```
~E2262V~D2264V ~NA001V. Placing one or more telephone calls, anonymously, at any
unreasonable hour, in an offensive and repetitious manner, or without a
legitimate purpose of communication.

~E2264V~D2268V ~NA001V. Causing bodily injury to Petitioner~D1500V or to a child
of either party~E1500V.

~E2268V~D2270V ~NA001V. Threatening Petitioner~D1500V or a child of either
party~E1500V with imminent bodily injury.

~E2270V~D2272V ~NA001V. Destroying, removing, concealing, encumbering,
transferring, or otherwise harming or reducing the...
```

Here's what the highlighted objects mean:

**~I0001V** - this is an assembly insert code which inserts the appropriate caption, depending on how many children are in the case (~A1500V);

**~FLNSPV** - the caption is single-spaced and then the form resets line spacing to "2". If the user set line spacing to something different in the format option in ProDoc, then this code will override the double spacing with whatever the user set;

**~L1300G** - this global loop loops one time for each Respondent. It has logic which presets the count to "1" when the user is preparing Family Law documents;

**~P1308G** - this global merge question asks for the name of each Respondent. Since the loop it is in (L1300G) is preset to "1" for family law, the user will only be asked for the name of one Respondent;

**~ELOOPG** - this end loop token signifies the end of the loop for the respondent's name;

**~D1500V** - this delete object deletes the following paragraph if there are no children in the case. (~A1500V);

**~I2004V** - this assembly insert code inserts "ren" if there are more than one child in the case;

**~I2003V** - this assembly insert code inserts "are" or "is", depending on how many children are in the case;

**~M1504V** - this merge insert object inserts the name(s) of the child(ren) into the document in a formatted list. A formatted list means, if there are more than one child, there is a comma between each name and an "and" before the last name;

**~E1500V** - this end delete token marks the point to quit deleting if there are no children;

**~NA001V** - these numbering tokens will sequentially number each of the paragraphs in the completed document.

# Appendix C - Timeslips Extension

## Overview

The Timeslips extension gives you the ability to bill your clients by generating "slips" for each document created in ProDoc. Generating a slip takes place after document assembly in ProDoc and before the document is opened in the word processor.

You must install Timeslips version 9.1 (or newer) in order to implement this extension.

ProDoc's database files must first be synchronized with Timeslips' database files. Synchronization ensures that changes made in one program's database are replicated in the other program's database. There are many ways in which the synchronizer can be used:

- If you are a new Timeslips user and a current ProDoc user with Client and Case information, the Synchronizer will automatically export all the records into Timeslips. Conversely, if you are a new ProDoc user and a current Timeslips user, the Synchronizer will export all clients and projects into ProDoc.
- You can set the Timeslips extension to keep both databases synchronized automatically or manually.
- You can individually select, in either Timeslips or ProDoc, which records to synchronize.
- After the first step is completed, you can set the Synchronizer to display only new records which have not been previously synchronized. This gives you the opportunity to decide later whether or not you want to synchronize the records.

It is important that you read this appendix thoroughly before proceeding to integrate ProDoc and Timeslips.

## Step 1: Setting up ProDoc before synchronization

There are some specific requirements in the synchronization with Timeslips, which you will need to satisfy before synchronizing.

1. From the Main Menu, click **Customize > Options**, then click the **Timeslips** link on the left side of the options and settings window. See the **Timeslips Settings** 71 section of this manual for a view of the screen.
   a. Select the box labeled **Enable the Timeslips Connection.**
   b. If desired, click the **On** radio button to have the synchronizer start each time you run ProDoc. If you do this, ProDoc will attempt to connect with Timeslips in subsequent program starts. If you select **Off,** you will need to use the **Tools** menu to manually start the synchronization process.
   c. You will now have a new menu option under the **Tools** menu, titled **Timeslips**, which branches to **Timeslips setup, Timeslips synchronizer,** and **Timeslips task manager**. You will use these menu items while managing ProDoc and Timeslips interactions.
2. We recommend that you assign **Client IDs** and **Case IDs** in order to simplify the synchronization.
   a. First, set up ProDoc to use unique Client and Case IDs. From the Main Menu, click **Customize > Options,** then click the **Clients & Cases** link at the left of the window. Ensure both boxes on this window are selected. See the **Client & Case Settings** 72 section of this manual for help with this process. Each client record and project record in Timeslips contains a field called Nickname1. These fields are required and must contain a unique value. The ProDoc "Client ID" field and "Case ID" fields are the fields which must match the "NickName1" fields in Timeslips.
   b. Next, if you haven't already assigned IDs to your cases and clients, use the **Client & Case Manager** 32 to enter Client IDs and Case IDs for each client and case in your database.
   c. Exit ProDoc and proceed to Step 2.

**Why use Client and Case IDs?** If you are using Client IDs and Case IDs in ProDoc, then the

synchronizer will use those fields to fill in the Timeslips NickName1. If these fields are vacant in ProDoc, the synchronizer will attempt to "intelligently" fill in those fields in BOTH programs using your client's initials.

You should not rely too much on this convention, as Timeslips does not allow for duplicated NickName1 and you may very well have another client with identical initials. For this reason, if you are not using Client IDs and/or Case IDs in ProDoc, you should be sure to set up auto formatting for Nickname1 in Timeslips and that scheme will then be used when you synchronize clients. Better yet, take the time to go into the Client & Case Manager and assign client and case IDs to everyone. Timeslips limits its Nickname1 field to 30 characters or less. When setting up Client IDs and Case IDs in ProDoc, make sure to keep them under 30 characters long when combined.

If, after synchronization, you find ProDoc records marked as not synchronized, chances are there is another record already in Timeslips with the same Nickname1.

**NOTE:** If you have the same case code for two different clients, it will work with Timeslips provided the client nickname is different. For example, if you use 1999/3/16-Divorce to refer to Smith' s divorce and 1999/3/16-Divorce to refer to John' s divorce, it will be inserted in Timeslips as Smith!1999/3/16 and John!1999/3/16.

Once synchronization is completed, updating names, addresses and related information in one program will update the same information in other programs' data files. Initially, these options are set to automatically synchronize.

## Step 2: Setting up Timeslips before synchronization

To work properly with ProDoc, some methods that are allowed in Timeslips should be avoided to keep the two databases as compatible as possible. This appendix details those specific points that you should check. If you are an existing Timeslips user, you may need to make some changes in your database to avoid more work once both products are synchronized.

Timeslips offers three billing system possibilities: per Client, per User, and per Task. ProDoc works only with the "per Task" billing system on a flat rate. If you have currently defined a billing rate for your Clients and Timekeepers, you can still use these for all jobs not related to ProDoc. However, in order to bill from ProDoc, you will need to define tasks that will be used by ProDoc to generate slips.

**New Timeslips user**

If you have been using ProDoc and recently installed Timeslips, carefully read your Timeslips software manual before attempting to initiate the synchronization process. In particular it is important that you understand the concept of "Templates" and "New Name" defaults as defined in the Timeslips Version 9.1 or later manual. These allow you to define options for billing your clients and other important settings.

When ProDoc exports clients into Timeslips, it uses the appropriate template if one exists. If there is no template, then the imported client will reflect the default settings in Timeslips. Clearly it would be better to have new Timeslips clients set up the way you want them rather than relying on the Timeslips default settings. Likewise, if your firm uses a specific coding scheme for client id's, you will want to set this up in Timeslips before you import clients from ProDoc.

**NOTE:** See Nickname Formatting in your Timeslips software manual for more information.

You should familiarize yourself with Timeslips and then define how you want to bill your clients. To save time, use Timeslips templates whenever possible. **You must perform the following two steps before using Timeslips and ProDoc together:**

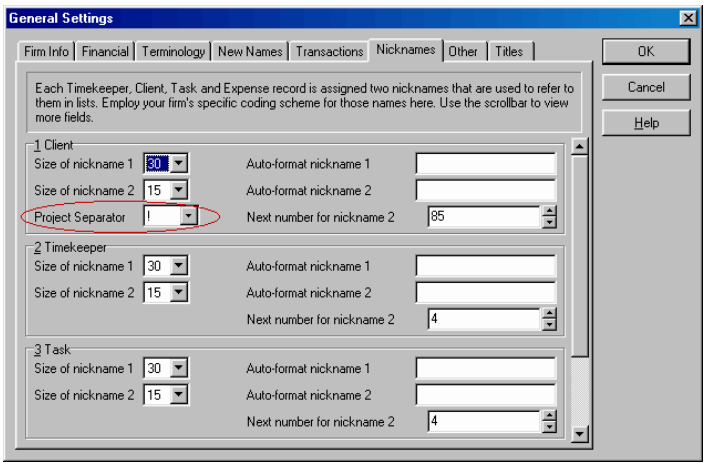



Figure C-1, Timeslips General Settings Window

1. **Define a "project" separator.** "Project" is the Timeslips term that ProDoc will refer to as "Cases". Access this option from the Timeslips Setup menu. Click the **General** item and then click on the **Nicknames** tab. A window similar to Figure C-1 appears.

2. **Define a "Default" Task** to be used by ProDoc when no Task has been assigned to a form. You may want to define more tasks, but the "Default" is needed to begin generating slips from ProDoc. You define tasks by going to **Timeslips Navigator**, clicking **Tasks** and then selecting **New Task.**

During initial synchronization, you will select the default task that you've set up in Timeslips and enter a default charge for the task. This is needed in the beginning, and it can be changed while generating slips.

**Existing Timeslips Users**

If you have been using Timeslips and recently installed ProDoc, there are a few items that you need to consider in Timeslips. In particular:

- Timeslips allows you to combine both client and project information into a single master record (i.e., Jones/Divorce),
- Or, you can have one master record (i.e., Jones), which stores client information, and separate records for each project (i.e., Divorce or Bankruptcy, etc.)

ProDoc can only synchronize records when there is a separate master record for each client with separate records for each project (Option B).

Therefore, if you have combined client and project information into a single master record, you will have to modify your database before attempting to synchronize the databases. To modify your database, you must add a record to store the client alone, check the master checkbox for this record and then uncheck the master mark for the client/project record. This is the only way to ensure that your Timeslips records will be properly synchronized with ProDoc.

ProDoc assumes that the "master" record stores only the client information and has no project separator character in the NickName1 field. The "child" records (cases) are the only ones to have this character. Double check your database to ensure that is correct if you want to have a smooth synchronization process.

You will also want to check that EVERY "client/case" record has a full name in your database before exporting your records to ProDoc and synchronizing. If this field is blank, the record will NOT be imported in ProDoc. If necessary, you can correct this later, although these Timeslips records will be marked as not synchronized.

## Step 3: Start ProDoc and run the Timeslips Synchronizer Settings Wizard

Setup options for synchronizing the databases are primarily established from within ProDoc. These options include either automatic or manual processing of data, frequency, and timing. You can run the synchronizer settings wizard from the Main Menu by clicking **Tools > Timeslips > Timeslips setup**. This action will initiate five wizard settings windows similar to Figures C-2 through C-6.

***Important Note: If this is the first time you are running the Synchronization Wizard, the default settings should normally be used.***

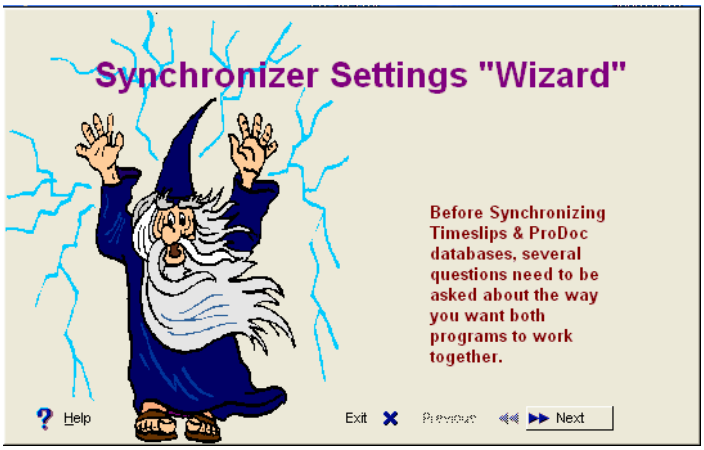

Synchronizer Settings "Wizard"
Before Synchronizing Timeslips & ProDoc databases, several questions need to be asked about the way you want both programs to work together.
Help
Exit
Next

Figure C-2, Synchronizer Settings Window 1

The first settings window informs you that several questions need to be asked about how you want ProDoc and Timeslips to work together.

This window sets the stage for the four remaining settings windows.

Click **Next**.

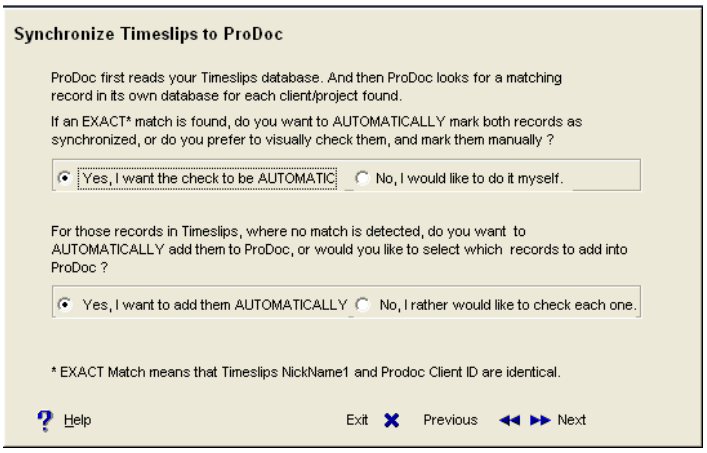

Synchronize Timeslips to ProDoc
ProDoc first reads your Timeslips database. And then ProDoc looks for a matching record in its own database for each client/project found.
If an EXACT* match is found, do you want to AUTOMATICALLY mark both records as synchronized, or do you prefer to visually check them, and mark them manually ?
Yes, I want the check to be AUTOMATIC
No, I would like to do it myself.
For those records in Timeslips, where no match is detected, do you want to AUTOMATICALLY add them to ProDoc, or would you like to select which records to add into ProDoc ?
Yes, I want to add them AUTOMATICALLY
No, I rather would like to check each one.
* EXACT Match means that Timeslips NickName1 and Prodoc Client ID are identical.
Help
Exit
Previous
Next

Figure C-3, Synchronizer Settings Window 2

The first option here applies only to those who already have databases in both ProDoc and Timeslips. It lets you check the status of a record before it is synchronized.

The second option is to add records in ProDoc. Be aware that if you answer **No** to both questions, and press the **Begin** button on the synchronizer window, you will have to synchronize all your records by dragging and dropping each of them. For now, if you are synchronizing for the first time, accept the default settings and click **Next** to continue.

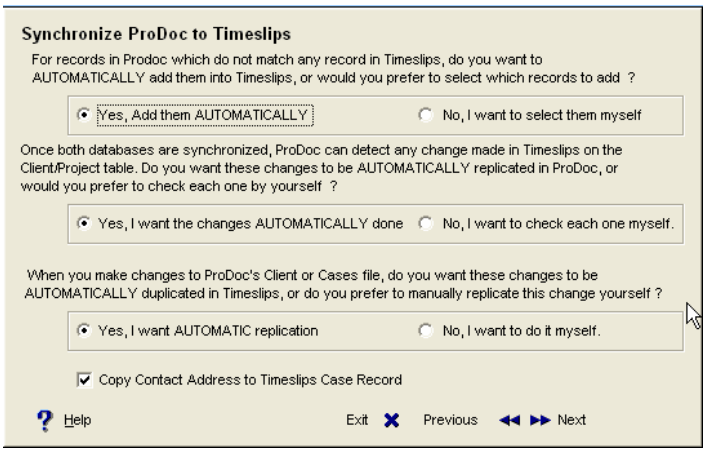

Synchronize ProDoc to Timeslips
For records in Prodoc which do not match any record in Timeslips, do you want to AUTOMATICALLY add them into Timeslips, or would you prefer to select which records to add ?
Yes, Add them AUTOMATICALLY
No, I want to select them myself
Once both databases are synchronized, ProDoc can detect any change made in Timeslips on the Client/Project table. Do you want these changes to be AUTOMATICALLY replicated in ProDoc, or would you prefer to check each one by yourself ?
Yes, I want the changes AUTOMATICALLY done
No, I want to check each one myself.
When you make changes to ProDoc's Client or Cases file, do you want these changes to be AUTOMATICALLY duplicated in Timeslips, or do you prefer to manually replicate this change yourself ?
Yes, I want AUTOMATIC replication
No, I want to do it myself.
Copy Contact Address to Timeslips Case Record
Help
Exit
Previous
Next

Figure C-4, Synchronizer Settings Window 3

For the first choice, if you are importing from ProDoc to Timeslips and answer **No** here, nothing will happen when you press the **Begin** button. You will have to drag and drop each record.

The two other choices affect daily usage after initial synchronization. Answering **No** here will disable the automatic processing, and you will need to use the synchronizer. Again, when initially synchronizing, accept the default selections and click **Next**.

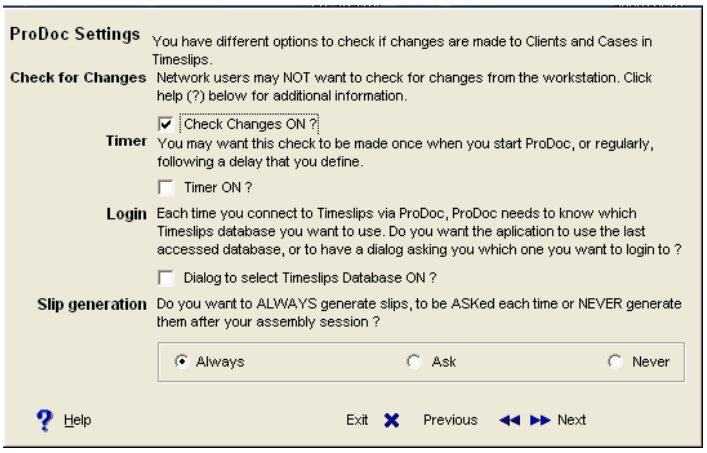

ProDoc Settings
You have different options to check if changes are made to Clients and Cases in Timeslips.
Check for Changes
Network users may NOT want to check for changes from the workstation. Click help (?) below for additional information.
Check Changes ON ?
Timer
You may want this check to be made once when you start ProDoc, or regularly, following a delay that you define.
Timer ON ?
Login
Each time you connect to Timeslips via ProDoc, ProDoc needs to know which Timeslips database you want to use. Do you want the aplication to use the last accessed database, or to have a dialog asking you which one you want to login to ?
Dialog to select Timeslips Database ON ?
Slip generation
Do you want to ALWAYS generate slips, to be ASKed each time or NEVER generate them after your assembly session ?
Always
Ask
Never
Help
Exit
Previous
Next

Figure C-5, Synchronizer Settings Window 4

This window will modify how ProDoc handles changes that are made in Timeslips. A computer running ProDoc can be set to automatically check for changes made in Timeslips every few minutes or once each time you start ProDoc.

In a networked environment, it would be most efficient to have only one workstation checking for changes in the Timeslips database. Since these settings are per workstation, we recommend that this checkbox only be set "ON" at one workstation on the network. The workstation which checks for changes should be one which is used every day. If you uncheck this box, choices for the timer settings will disappear.

If you uncheck **Timer ON?**, changes made to your Client/Cases database in Timeslips would only be checked when you start ProDoc. This choice would be very logical if you are on a stand-alone computer and you are the one making the changes.

If the timer is on, you can set the frequency that checks are to be made. By default, it is 1 minute, but you may prefer to have ProDoc checking for changes in Timeslips less frequently. To increase the time between checks, just increase the value in the timer delay field.

Moreover, if the timer is set to **ON** and you have other applications open such as your word processor, every time the check is made screen focus will unexpectedly return to ProDoc. If this proves bothersome for you, you may want to not check it **ON**.

In Timeslips, you can have multiple databases. Most law offices will probably not use this feature and therefore do not want to specify which Timeslips database to use every time they start ProDoc. If you check the box labeled **Dialog to select Timeslips database ON?,** you will be presented with a window each time you start ProDoc which will ask which Timeslips database you want to use. The default is unchecked. You should leave it unchecked if you only have one database set up in Timeslips. It is logical to assume that you want to use the same database as you used the previous time.

The last choice concerns slips generation after you generate documents for a case. By default, it is set to always generate a slip. You can change the default setting to be asked each time or you can set it to never generate a slip. Keep in mind that even if you set this to always generate a slip, you will still always be able to cancel or edit the slip before ProDoc sends it to Timeslips. Again, accept the default settings and click **Next** if you are synchronizing for the first time.

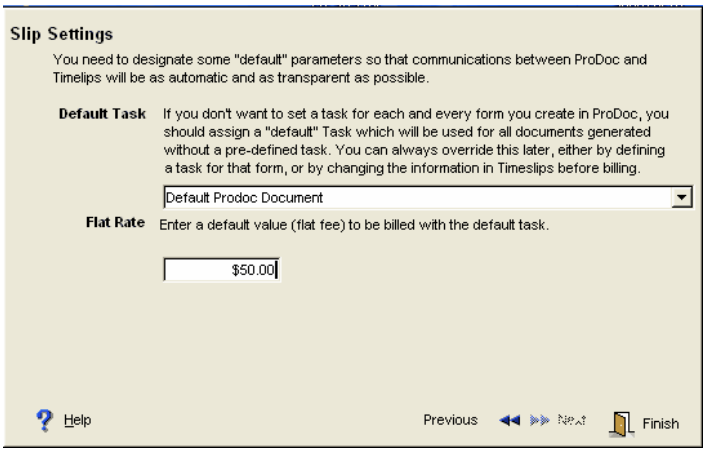

Slip Settings
You need to designate some "default" parameters so that communications between ProDoc and Timelips will be as automatic and as transparent as possible.
Default Task
If you don't want to set a task for each and every form you create in ProDoc, you should assign a "default" Task which will be used for all documents generated without a pre-defined task. You can always override this later, either by defining a task for that form, or by changing the information in Timeslips before billing.
Default Prodoc Document
Flat Rate
Enter a default value (flat fee) to be billed with the default task.
$50.00
Help
Previous
Next
Finish

Figure C-6, Synchronizer Settings Window 5

The last settings window allows you to select which Timeslips task will be your "default" task. All documents generated from ProDoc without an "assigned" task will generate a Slip using this default task. In order to select a default task here, your Timeslips installation must have the task set up and active.

ProDoc will use the value you specify here instead of any rate you place on the default task when setting it up in Timeslips.

Regardless of any default values you enter here, you will be able to cancel or edit any slip before ProDoc sends it to Timeslips. If you are synchronizing for the first time, accept the default settings and click Finish.

## Step 4: Start the Synchronization process

Depending on your particular circumstances, one of the following scenarios probably applies to you:

- If you are already a Timeslips user and just acquired ProDoc to assemble your legal documents, read the section below called "From Timeslips to ProDoc".
- If you are a ProDoc user and just installed Timeslips, you will want to read about "From ProDoc to Timeslips".
- If you were already using both products, but with a previous version where the synchronization between the two was not available, read about "Both Together".

**NOTE:** This distinction is valid only for your first use. Once both databases are synchronized, the process will be the same, whatever "history" you have.

After you have complied with the prerequisites discussed above, ProDoc and Timeslips will be properly configured. You can now begin the synchronization process. To start the synchronization process, open ProDoc and click **Tools > Timeslips >Timeslips synchronizer**. A window similar to Figure C-7 will appear.

**NOTE:** If you don't see this option in your Tools menu, there is a problem with your Timeslips installation, and ProDoc cannot find it.

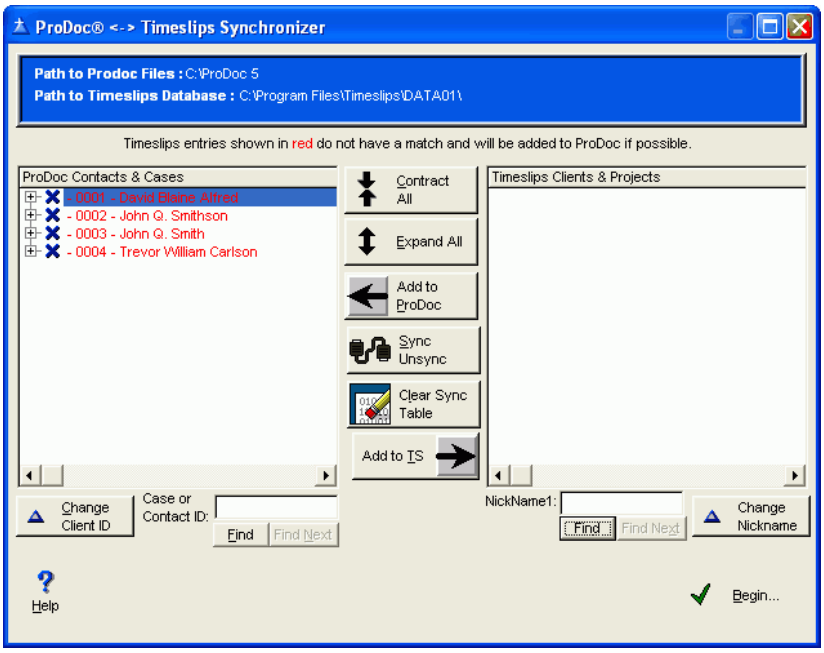



Figure C-7, Synchronization Window

The Synchronizer window will be different depending on which application is the new one for you.

**NOTE:** Before the synchronization, when you run ProDoc, you may see an error message stating "There are no records to Process". This is because each time you run ProDoc, it will build a table with matching records in ProDoc and Timeslips.

## From ProDoc to Timeslips

As a new Timeslips user running the synchronizer for the first time, you should see something like the window shown in Figure C-7.

The list on the left side is your ProDoc contact file, and linked to each client are the case(s) for that client. This type of display is called a tree. To see the cases for each client, just click the + sign to expand that branch of the tree.

The blue cross icon means that this record is not yet synchronized.

The buttons in the center of the window are usually not used in initial synchronization. These are used in later sessions. Click on the Help icon in the lower left portion of the window to see full details on these buttons.

To launch the export/synchronization process itself, click the **Begin** button in the lower right hand corner of the window. While the synchronization is in process, the name of your client/case being synchronized is displayed on the bottom of the screen. Be patient as this process could be quite lengthy depending on your computer's performance and how many clients/cases you have in the database.

After synchronization is completed and both databases are fully synchronized, all records should now have a green checkmark icon meaning that the record is synchronized.

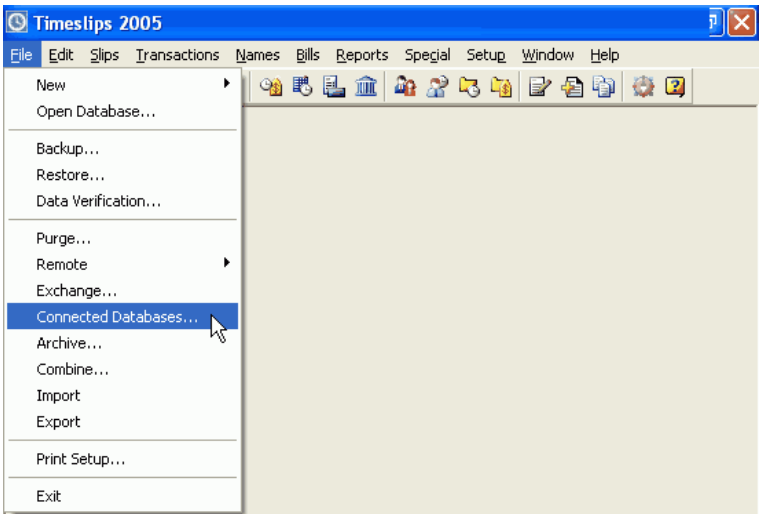



Figure C-8, Selecting Timeslips Connected Databases

To check the current state of synchronization, open Timeslips and click **File > Connected Databases**. select the menu item Special from the main screen. Then, click on Connected Databases from the drop down window as shown in Figure C-8.

**NOTE:** You will notice that ProDoc has been added as the last item on this menu, which allows you to run ProDoc from Timeslips.

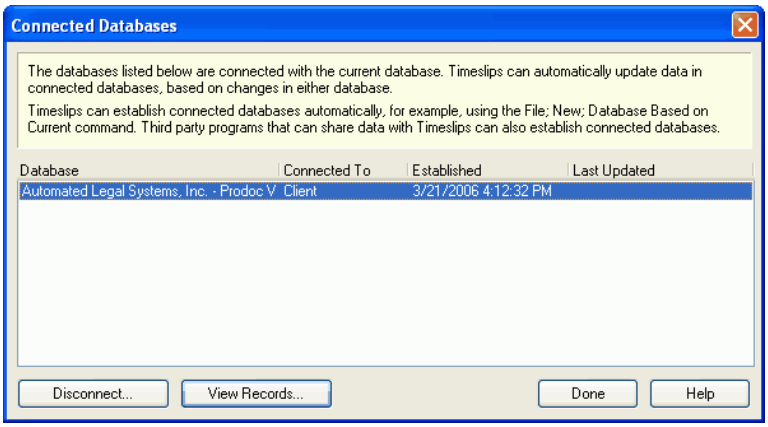

Connected Databases
The databases listed below are connected with the current database. Timeslips can automatically update data in connected databases, based on changes in either database.
Timeslips can establish connected databases automatically, for example, using the File; New; Database Based on Current command. Third party programs that can share data with Timeslips can also establish connected databases.
Database
Connected To
Established
Last Updated
Automated Legal Systems, Inc. - Prodoc V
Client
3/21/2006 4:12:32 PM
Disconnect...
View Records...
Done
Help

Figure C-9, Connected Databases Window

You should then see something like the window in Figure C-9, which confirms that both applications are properly linked together.

You can click on the **View Records** button to see a list of all your Timeslips clients/cases records, with a **Yes** displayed in the Connected column. If you are not sure about synchronization for one particular record, this is the place to look.

## From Timeslips to ProDoc

If you are a new ProDoc user, the only real difference is that the empty list will be on the left side in Figure C-7 with your Clients/Cases relation tree on the right side. Click on the "begin" button, and watch your records being converted/synchronized into ProDoc.

## Both together

If you were using both applications before the synchronization was available, you should refer to BOTH "existing" Timeslips user above, and "existing" ProDoc user above, as the synchronization process will attempt to match records from ProDoc client IDs and case IDs with Timeslips NickName1. If those fields for clients and cases are different in each program, the process may create two entries in each program for each client and each case.

> **Note:** ProDoc exports phone numbers to Timeslips using a predefined scheme. On the other hand, if a phone number change is detected in Timeslips, there is no reliable way to determine which phone number changed or if a new number was added. The synchronizer process will systematically add the numbers for the contact into ProDoc using the order they are stored in Timeslips. So, if you wind up with several "home" numbers in ProDoc, it may be because you changed a phone number in Timeslips and the number was then incorrectly added to ProDoc during synchronization. In short, once the two databases are synchronized, **it is more efficient to add clients and cases or make changes in ProDoc rather than in Timeslips.**

## Daily ProDoc use with synchronization

Each time you run ProDoc, you will briefly see a small information window telling you that ProDoc is connecting to Timeslips. ProDoc is reading the synchronization tables to store them in memory so that changes made in one or the other database can be replicated in the matching record.

Should you want to change the default settings used in the initial synchronization, you can do so by selecting **Tools > Timeslips > Timeslips setup** from the ProDoc menu. This will bring up the same series of five windows previously described. Use this procedure to customize the way subsequent synchronizations will work. You should become familiar with the options described for each of the five windows before beginning to work with both applications linked together.

## Add or make changes to clients and cases in ProDoc

Now that the synchronization is operational and the settings are acceptable, you will want to know what happens if you change, add or delete a client and/or a case in ProDoc.

If you have not changed the settings, the routine synchronization with Timeslips will be completely transparent. Therefore, when you select a client in ProDoc and change the name, address, or even the Client-ID and click OK, you will find these changes reflected to the same client in Timeslips. You can do the same for a case, or add a new case.

If you have changed your settings so that the synchronization is not automatic, you will not see the changes in Timeslips immediately. In this case, you will need to run the Synchronizer and use it to synchronize any changed records by using the buttons in the center of the window or with drag and drop. **Important note: If you delete a client and/or a case in ProDoc, these will NOT be deleted in Timeslips.**

## Add or make changes to clients and cases in Timeslips

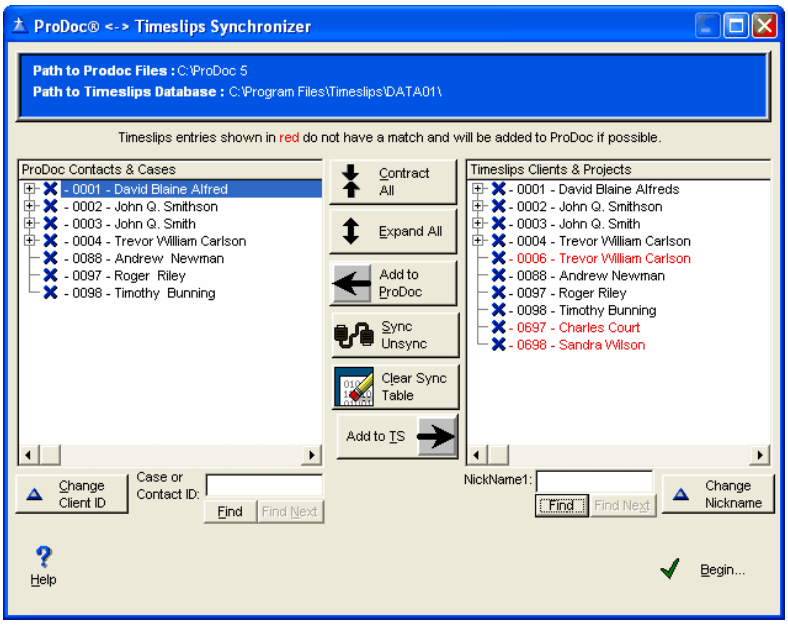
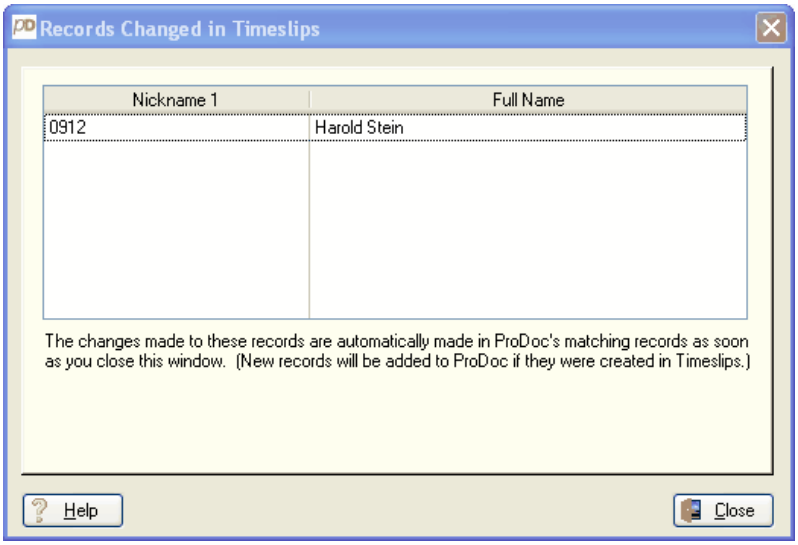

ProDoc® <-> Timeslips Synchronizer
Path to Prodoc Files : C:\ProDoc 5
Path to Timeslips Database : C:\Program Files\Timeslips\DATA01\
Timeslips entries shown in red do not have a match and will be added to ProDoc if possible.
ProDoc Contacts & Cases
- 0001 - David Blaine Alfred
- 0002 - John Q. Smithson
- 0003 - John Q. Smith
- 0004 - Trevor William Carlson
- 0088 - Andrew Newman
- 0097 - Roger Riley
- 0098 - Timothy Bunning
Contract All
Expand All
Add to ProDoc
Sync Unsync
Clear Sync Table
Add to TS
Timeslips Clients & Projects
- 0001 - David Blaine Alfreds
- 0002 - John Q. Smithson
- 0003 - John Q. Smith
- 0004 - Trevor William Carlson
- 0006 - Trevor William Carlson
- 0088 - Andrew Newman
- 0097 - Roger Riley
- 0098 - Timothy Bunning
- 0697 - Charles Court
- 0698 - Sandra Wilson
Change Client ID
Case or Contact ID:
Find
Find Next
NickName1:
Find
Find Next
Change Nickname
Help
Begin...

Figure C-10, Synchronization Window

When you add or change a Client and/or a case in Timeslips , that change will be reflected differently in ProDoc depending on your settings. If **Check Changes ON** is not checked, you have disabled ProDoc's mechanism for automatically detecting changes made in Timeslips.

If you have disabled automatic checking, the only way to see if changes have been made and to import them is to run the Synchronizer from ProDoc's **Tools** menu. Figure C-10 shows some Timeslips records listed in red color that were added to Timeslips and have not yet been synchronized.

If you left your settings to have the synchronizer operate automatically, you will see a window like Figure C-11 each time you run ProDoc. If you elected in setup to check every few minutes, you will see it every time an automatic check finds records which need to be synchronized.


Records Changed in Timeslips
Nickname 1
Full Name
0912
Harold Stein
The changes made to these records are automatically made in ProDoc's matching records as soon as you close this window. (New records will be added to ProDoc if they were created in Timeslips.)
Help
Close

When the synchronizer adds or changes a client in ProDoc, a window like the one in Figure C-11 will pop up to let you know about the change so that you are not surprised to discover new names in your client list.

Just click the **Close** button. The process is the same for adding new clients or changing existing client information.

Figure C-11, Records Changed in Timeslips

## Defining tasks and assigning fees to tasks

The Task Manager lets you assign a pre-existing Timeslips task to either an individual ProDoc master form or to a form set. **You cannot create Timeslips tasks in ProDoc. You can only assign them from within ProDoc.** If you do not assign a task, ProDoc will use the pre-defined "Default" task. Assigning fees to a predefined task is done only in Timeslips. Modifying fees for a completed document can be done in ProDoc when you are generating the time slip. The tasks themselves are created in Timeslips. If you want to use a task for generating slips in ProDoc, you will need to "assign" the task to forms or form sets in ProDoc. You decide which rules to follow when you bill your clients for the work done in ProDoc.

You should initially create a task in Timeslips intended to be your "default" task. That means that anytime you generate a document in ProDoc for a case and you have not assigned a specific task for that form or form set, ProDoc will use information from the default task. You can always change or cancel this Slip before it is sent to Timeslips. Creating this default task is the best way to get accustomed to this feature. In due time, you will develop your own guidelines for which forms or form sets you want to create individual tasks for. When you define a task in Timeslips, it should be set as billable and the **rate type should be Flat** rather than hourly.

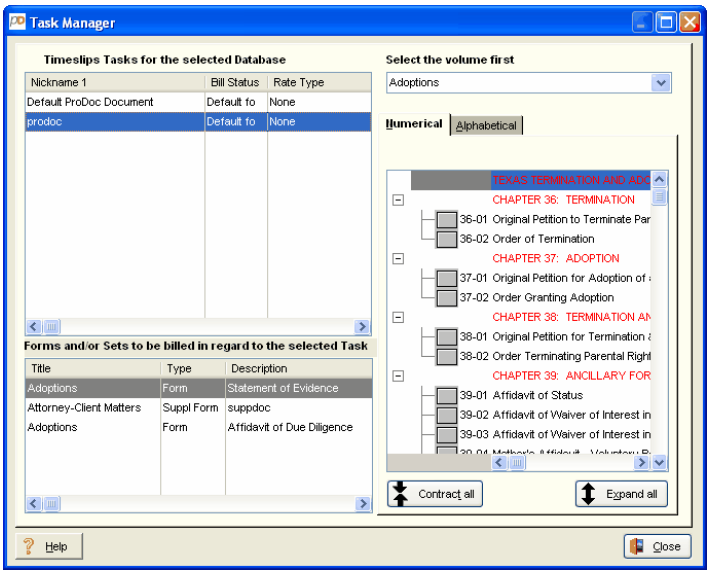



Figure C-12 shows the Task Manager, which is used to assign Timeslips tasks to specific forms or form sets. You access the Task Manager Wizard by clicking **Tools > Timeslips > Timeslips task manager** from the ProDoc menu.

Figure C-12, Task Manager Window

When you generate a form set which is covered by a Timeslips task, ProDoc will generate only one slip for that task instead of one slip for each document. It is a very simple operation to assign a form or form set to a task. First, select the desired task in the upper left list box. Then select the form on the right (after selecting the volume you want), and "drag" it (by holding your left mouse button down while you move the mouse cursor) to the list of assigned forms on the lower left side. Then drop it there, by releasing your mouse button. When you see the mouse cursor changing to a down arrow, it means that your "drop" will be valid. The first task shown above has no form assigned to it since it is the task which will always be used by default. If you don't assign forms to tasks here, you can still assign them on the fly after you generate the documents in ProDoc. After you find yourself assigning the same task and form over and over again as you generate slips in ProDoc, you will eventually see that it would be more efficient to come to this Task Manager and assign the task permanently.

Conversely, you might also want to create a series of tasks in Timeslips that are keyed to a dollar value such as "created a $25 ProDoc document". You would also have tasks for documents valued at $50, $75, etc. Then, you can assign them to each applicable form by dragging and dropping the form from the right hand pane to the bottom left pane in the task manager.

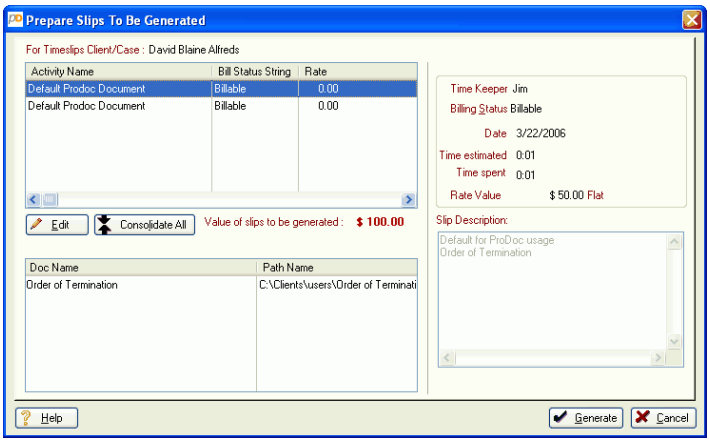
## Generating Slips

Finally, you are ready to generate slips in ProDoc as you assemble documents for a case.

Generating slips is a seamless process in ProDoc. If you select a client and case at the beginning of the assembly session and that case is properly synchronized, ProDoc will generate a slip. When the slip is presented at the end of an assembly session, you can edit any significant information, like the "timekeeper", the dollar value, etc., before "sending" the slip to Timeslips.

You will still be able to edit the slip before billing the client in Timeslips.

Your settings on Window 4 of the setup wizard will affect how slips are generated. You may select to NOT generate slips, which could be useful if you are still making tests and you do not want your actual database to be affected by these tests. You can also select NOT if you have Timeslips but you don't yet want to use it from within ProDoc.




In any other case, you should see a window like the one in Figure C-13 when ProDoc is preparing to generate slips.

In this example, a document has just been generated for which no specific task has been assigned. As a result, the standard default task is used. You see in the upper left list box the slips to be generated, with the name of the task used, as well as the default value, and billing status.

Figure C-13, Prepare Slips to be Generated Window

In the lower left list box you see the title and filename of the document included in the slip, which is highlighted. Multiple documents would be listed if the slip were for a form set. In the text box on the lower right you will see the Slip description. By default, ProDoc will use a list of the documents generated as the description of the task.

If you click on the **Edit** button, you will see a window like the one shown in Figure C-14.

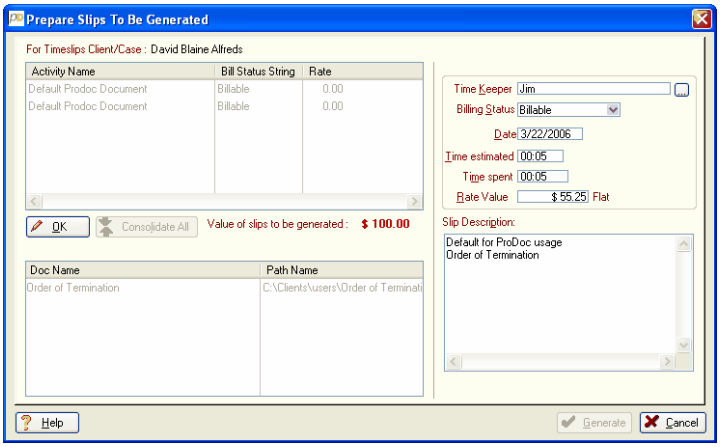



Figure C-14 illustrates what you see when you are in edit mode for the highlighted slip. The two list boxes on the left are disabled (grayed out), but you can edit all the fields on the right side. In this example, we have changed the value for this slip from $50.00 to $55.25

Clicking on the **OK** button will save your changes.

Figure C-14, Prepare Slips to be Generated Window

You may see a **Consolidate All** button. This command allows you create a single slip from all listed slips so that you will have only one slip for all of the generated documents. All of the listed tasks will be consolidated into the task, which is highlighted when you click the **Consolidate All** button.

If you have many different documents and different kind of tasks, you may wish to consolidate your slips, but not all together. To achieve this, simply drag the desired task and drop it on the "target" task. Doing that allows you to individually consolidate your slips rather than consolidating all of them. In the example on the previous page, either method would yield the same result.

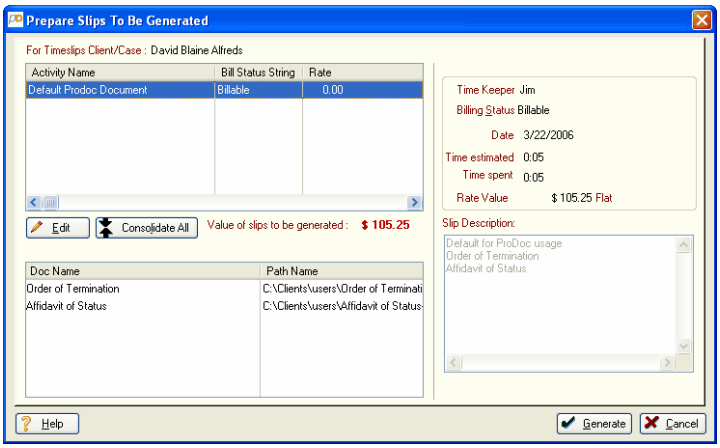



Figure C-15, Prepare Slips to be Generated Window

Figure C-15 shows what you get after saving your changes.

Now, clicking the **Generate** button will close the window and send the data to Timeslips.

**NOTE:** You may want to initially utilize the foregoing procedure to simply edit the dollar value of the default task for each document you generate.

# Appendix D - Creating Supplemental Forms

## Purpose

ProDoc contains a considerable number of volumes with thousands of professionally developed master forms. However, you may wish to add your own forms to ProDoc's volumes. Using ProDoc's supplemental forms feature, you can create documents to assemble in ProDoc from documents you are using in your practice. This section describes the process of creating supplemental forms.

**NOTE:** Appendix B 198 of this manual contains useful technical information regarding the process ProDoc uses to assemble documents. Also, feel free to call 800-759-5418 for assistance. Just ask to speak with a representative from our Technical Support department.

## Process

Follow these steps when creating supplemental forms. First, create or open a document in your word processor. Next, print the document and highlight those items that represent variable information. In ProDoc, create tokens to represent the variable information needed in your document. Return to your word processor and insert the tokens into your document. Save the document to the correct ProDoc volume. Associate the document to the ProDoc database and test the form by assembling the document.

**NOTE:** The steps in creating supplemental forms do not have to be performed in the order below.

## Step 1 - Create or open the Supplemental form (template) in your word processor

The first step in creating your own supplemental forms is to draft or open a form in your word processor. You can draft your form entirely from scratch; base it on a previously prepared document; or use an assembled ProDoc document.

## Step 2 - Identify Items Of Variable Information

Print a copy of the form to determine the variable information on the form. Highlight or draw a line through each item of information that could be considered variable. Variable information is information such as dates, names, addresses, etc. asked for in the same manner each time a document is assembled (e.g. What is today's date?, What is the client's name?, etc.), but answered differently for each client and case (e.g. June 13, 2000, or John Doe).

For example, let's look at a sample letter to a client confirming his appointment. See Figure 1. The variable information needed appears in bold UPPER-CASE letters at the locations in the letter where each answer should be inserted.

**Figure 1 - Sample Letter**

**DATE**

**CLIENT'S NAME INSIDE**
**CLIENT'S STREET ADDRESS**
**CLIENT'S CITY, STATE ZIP CODE**

Re: **TYPE OF CASE**

Dear **SALUTATION FOR CLIENT**:

Thank you for contacting our office and giving us the opportunity to review your **TYPE OF CASE** claim.

This letter shall serve to confirm your appointment with attorney **NAME OF ATTORNEY**, on **DATE OF APPOINTMENT** at **TIME OF APPOINTMENT**. If unable to attend this appointment, please contact me immediately at the below listed telephone number.

In order for me to review your claim thoroughly, please bring the following information, if available, with you to your appointment:

**INFORMATION TO BRING TO THE APPOINTMENT**

If you have any questions regarding this matter, please do not hesitate to contact our office. Your cooperation in this matter is appreciated.

Sincerely,

**NAME OF PERSON SIGNING LETTER**

## Step 3 - Assign tokens to items of variable information

You must assign a token and an appropriate question to each item of variable information in your supplemental form. Usually you will have to create your own tokens ("supplemental tokens"). For some items of variable information in your supplemental form, there might be a Global or Volume token in the database. If so, you may use the Global or Volume token instead of creating a supplemental token.

### Supplemental Tokens

For the sample letter above, supplemental tokens and questions might be assigned as follows:

| ITEM | TOKEN # | QUESTION |
|---|---|---|
| DATE | ~P0001S | Date Letter is being written? |
| CLIENT'S NAME INSIDE | ~P0002S | Client's Name for inside address? |
| CLIENT'S STREET ADDRESS | ~P0003S | Client's Street Address? |
| CLIENT'S CITY | ~P0004S | Client's City of Residence? |
| CLIENT'S STATE | ~P0005S | Client's State of Residence? |
| CLIENT'S ZIP CODE | ~P0006S | Client's Zip Code? |
| TYPE OF CASE | ~P0007S | Type of Case? |
| SALUTATION FOR CLIENT | ~P0008S | Salutation for Client? |
| NAME OF ATTORNEY | ~P0009S | Name of Attorney meeting with Client? |
| DATE OF APPOINTMENT | ~P0010S | Date of Client's Appointment? |
| TIME OF APPOINTMENT | ~P0011S | Time of Client's Appointment |
| INFO TO BRG TO APPOINT | ~P0012S | Information to bring to Appointment? |
| NAME OF PERSON SIGNING | ~P0013S | Name of Person Signing Letter? |

**NOTE:** If you have created other supplemental forms for the volume and an item of variable information appears in both the current form and one of the previous forms, you may assign the same supplemental token to the item in the current form as you assigned to it in the previous form. To see a list of all existing supplemental tokens for a specific volume, click **Print > Question Lists > Supplemental Questions**, choose the desired volume and print the report.

## Global and Volume Tokens

If a Global or Volume token exists for an item of variable information in your supplemental form then in most cases you can use the Global or Volume token in your supplemental form. Doing so saves you from having to create a supplemental token for the item of variable information. Also, when you assemble documents from both your supplemental form and another form that contains the Global or Volume token in the same assembly session, only the question for the Global or Volume token will be asked. If you used a supplemental token then the questions for both tokens, which would be essentially the same question, would both be asked.

To print or view a list of Global or Volume tokens, select **Print > Question Lists > Global Questions** or **Print > Question Lists > Volume Questions**. For volume tokens you must then select the volume to which you are adding the supplemental form. Volume tokens can be used only for supplemental forms saved in that volume as discussed in Method 1 below. Global tokens can be used in forms in all volumes, including a volume you create as discussed in Method 2 below. You are more likely to use Global tokens, which correspond to frequently used items such as Name of your Law Firm, Law Firm Address and Name of Primary Attorney. In our example we could assign the Global token ~P0190G ("Name of client's primary attorney:") to the NAME OF ATTORNEY item instead of ~P0009S.

Exercise caution when inserting Global and Volume tokens in supplemental forms as some can yield unexpected results. Call Technical Support for assistance if necessary.

Some of the more commonly used Global tokens include:

| TOKEN | QUESTION |
|---|---|
| ~P0001G | What is the name of your law firm? |
| ~P0002G | What is the law firm's address (block style)? |
| ~P0003G | What is the law firm's address (line style)? |
| ~P0007G | What is the law firm's phone number? |
| ~P0020G | What is the law firm's county? |
| ~P0108G | What is your first client's full name? |
| ~P0127G | First Client's name and mailing address? |
| ~P0190G | Who is the client's primary attorney? |

## Step 4 – Create Supplemental Tokens in ProDoc

If you are not using all global or volume tokens in your document, you must create supplemental tokens with corresponding questions. After creating the supplemental questions, enter them in the ProDoc database for use in your supplemental forms. From the toolbar in ProDoc, select **Customize > Supplemental Forms and Questions > Supplemental Questions.**

The **Supplemental Questions** browse window appears. This is where you add, change or delete supplemental tokens and questions. For our example, select **New** to create a new token and question. Next, select the volume and the **Supplemental Questions** dialog box appears.

There are several fields in the **Supplemental Questions** dialog box:

**Token -** Enter the token for the question, omitting its leading tilde (~) and trailing "S". The token must start with a P. For the first token in our example, we would enter P0001 in the Token field, instead of ~P0001S. Note: you must use capital letters.

**Question -** Enter the text of the question you want displayed to the user.

**Size / Rows -** Enter the number of rows (lines) you want to allow for the answer to the question.

**Columns -** Enter the number of columns you want in each row. The maximum number of columns allowed is 65 columns, which is the width of a normal page.

## Step 5 - Insert Tokens into your Supplemental Form

Now, return to the open form in your word processor and replace each item of variable information with the applicable token you created or found for it. After doing so, the sample letter above would look something like the sample supplemental form shown in Figure 2.

### Figure 2 - Sample Supplemental Form

**~P0001S**

**~P0002S**
**~P0003S**
**~P0004S**, **~P0005S** **~P0006S**

RE: **~P0007S**

Dear **~P0008S**:

Thank you for contacting our office and giving us the opportunity to review your **~P0007S** claim.
This letter shall serve to confirm your appointment with attorney **~P0009S**, on **~P0010S**, at **~P0011S**. If unable to attend this appointment, please contact me immediately at the below listed telephone number.
In order to review your claim thoroughly, please bring the following information, if available, with you to your appointment:
**~P0012S**
If you have any questions regarding this matter, please do not hesitate to contact our office. Your cooperation in this matter is appreciated.

Sincerely,

**~P0013S**

**NOTE:** If we chose to use the Global token ~P0190G rather than ~P0009S for the NAME OF ATTORNEY item, then we would replace the item in the form with ~P0190G rather than ~P0009S.

## Step 6 – Save the Supplemental Form

**Method 1 - Saving to an existing volume**

Save your form in the subdirectory of the existing ProDoc volume to which you want to add the supplemental form. For example, a Microsoft Word user creating a letter to confirm a client's appointment to be used in the Texas Litigation volume would save the form letter as C:\prodoc\txlit\ltr1.doc.

**NOTES:**

1) You can find the subdirectory for any volume by selecting either "Edit volume list" or "Show installed volumes" from the Tools menu and the Registration submenu. "Edit volume list" also shows the complete pathname of the subdirectory if you highlight the volume and click Change.
2) Supplemental form filenames should be no more than eight characters long.
3) The filename you assign must either have no extension or a .doc, .wpd or .wp extension. As illustrated in the above example, Microsoft Word versions 98 and later automatically append a .doc extension to filenames. Likewise, newer versions of WordPerfect add a .wpd extension. Older versions of either word processor may or may not assign an extension.
4) Save the supplemental form as file type WordPerfect 5.x.

**Method 2 – Saving to a newly created volume**

Another way of saving supplemental forms is to create a volume with a name of your own choosing. In order to create the new volume, open ProDoc and click **Tools > Registration > Edit Volumes List > New.** In the title box type the desired title (e.g. Supplemental Forms). In the Subdirectory box type the name of your new volume (e.g. supforms). You will be asked if you want to create a folder with that name. Click **Yes.** You now have a supplemental forms volume to store your supplemental forms into. Note: Creating a central volume for your supplemental forms enables you to maintain one comprehensive set of supplemental questions instead of smaller repetitive sets of supplemental questions for each volume.

## Step 7 - Adding your form in ProDoc's database

Now that your newly created supplemental form has been saved in a volume's subdirectory or a newly created volume, you must add the form to the list of supplemental forms for that volume. Select **Customize > Supplemental Forms & Questions > Supplemental Forms.** This brings up the **Volume Selection** window. Select the correct volume in which to add the supplemental form. Once you have made your volume selection, the **Supplemental Forms** window will appear.

**Supplemental Forms Window**

The **Supplemental Forms** window contains a list of the supplemental forms currently in a volume. It contains **New, Update** and **Delete** buttons which let you add a supplemental form to the volume, change the filename and title of the highlighted form, and remove the highlighted form from the volume. You can also change the volume shown in this window with the **Change Volume** button. Select **New** to bring up the **Supplemental Form** dialog box.

**Supplemental Form Dialog Box**

This box contains two fields to fill in.

**Filename -** Enter the filename for the form. This is the filename component under which you saved the supplemental form when you were in your word processor. For example, if you saved the form as C:\prodoc\txlit\ltr1.doc, then the filename you would enter here would be ltr1.doc.

**Title -** Enter the title of the form (e.g. confirmation letter) exactly as you want it to appear in the Select Forms window and other windows. It should be descriptive to make it easy to find the desired form in a list.

## Step 8 - Test the Form

After creating the form and adding the form and any new supplemental tokens to the database, you should generate a document to test the supplemental form. Start a document assembly session. When you arrive at the **Select Forms** window, select the volume for which you created the supplemental form, then select the **Supplemental** tab. This will display a list of all the supplemental forms in the volume. Select the form that you just created from that list in the same way as you select forms from the main forms list. After assembling a document from your newly created supplemental form, examine it to insure that the answers to the questions appear as expected.

# Appendix E - Backup and Restore

## BACKING UP FILES

Most people inadvertently delete files at one time or another. Hard disk drives can fail after extended use. To protect against such loss of data, you should make regularly scheduled backup copies of important data files to one of these forms of backup destinations:

- Removable media (diskette, writable CD, ZIP disk, data tapes, or a flash drive/thumb drive)
- Network drive on your office network (preferably to a server using a RAID disk storage subsystem)
- Off site data storage facility/data center

The ProDoc backup utility, at **Customize → Options → Backup** automatically creates a backup of all of your client data and case data, including case answers and links to existing documents.

If you run the SOS program and do your systematic backups from that program, all SOS billing and case management data is backed up, as well as the ProDoc program data listed above.

Due to the flexibility built into ProDoc, many other files containing modifications you may have made to your ProDoc data files may exist. These modifications include document formatting changes; modified master forms; and supplemental volumes, forms, and questions.

The automatic back up features in the ProDoc and SOS programs *do not* back up these additional personalized files or your completed documents. For this reason, we strongly encourage you to perform additional systematic backups of your completed documents and any other modified or customized forms and documents you have created, in addition to using the automatic backup utility.

### File Structure Planning

If you save the backup files in the same file structure used by ProDoc, it's *much* easier to restore correctly.

Perform these steps to set up the file structure on your backup drive:

1. Create a folder on your backup drive and name it **ProDoc Backup Utility Files** (For example: **Z:\ProDoc Backup Utility Files\ProDoc**, where **Z** represents the backup drive letter).
    a. Locate and copy the entire ProDoc installation folder (by default, **c:\ProDoc**) to this folder. This will work well as long as you have enough available space on your backup drive.
    b. Locate and copy the **clients** folder (by default, **c:\Clients**) to this **ProDoc Backup Utility Files** folder.
2. If you want to reduce the amount of drive space used on the backup drive, and make the restore process quicker, you can remove certain files from the folders you copied to **ProDoc Backup Utility Files** folder:
    a. In the copied backup folders named **ProDoc** and **Clients**, highlight and delete all individual files in the folders.
    b. Open each individual subfolder, and delete all individual files in each one. Don't delete the

folders themselves.

c. You should only have empty file folders when you are finished. This file structure will help save drive space and make the restore process quicker.

**Backup Procedure**

If you set up a file structure as described above, the steps in this section will help you ensure that any new ProDoc installation will operate in the same manner as your old installation. **Note:** SOS users should set up backups through SOS instead of ProDoc to preserve billing and case management data along with client/case data.

Perform these steps to back up your ProDoc data files:

1. Click **Customize → Options → Backup** to configure the needed settings.
   a. Check the **Auto Backup at exit** box and set the **Days between backups** number (we recommend using **0** to always backup when you exit ProDoc).
   b. Click the **Station triggering automatic backups** field and select the login name or initials of a user who uses ProDoc on a daily basis.
   c. In the **Backup folder** field, enter the drive letter and folder names you used in step 1 under File Structure Planning, (For example: **Z:\ProDoc Backup Utility Files\ProDoc**, where **Z** represents the backup drive letter). Click **OK** to save your changes.
2. Back up your **completed document folders** to your backup drive every day, or any time you create/update documents. If you use the default document locations, copy the **c:\Clients** folder to your backup drive. If you save documents elsewhere, back up the appropriate folders, preferably to the same location or folder on the drive relative to your ProDoc installation folder.

If you are sure you **haven't** modified ProDoc, you can stop here. If you **have** modified document formatting or forms; or created supplemental forms, questions, or forms sets; continue to Step 3. You need to back up these files.

3. Perform the following steps once, then do them again any time a user changes formatting, modifies a form, updates supplemental forms/questions or creates/modifies a form set.
   a. In the installation directory (by default, **c:\ProDoc**), copy any files named **xxxgcfg.ini** (**xxx** represents user login name or initials) to **Z:\ProDoc Backup Utility Files\ProDoc** where **Z** represents the backup drive letter. Do the same with the **global.cif** file if it exists.
   b. In each subfolder of the installation directory, locate the following files and copy them to the same folder name on your backup drive:
      i. Any files with the extensions **.doc, .wpd, .wp, .cif,** or **.ini.**
      ii. **Docgrps.tps, grpitems.tps, Sdocs.tps, SQues.tps, SLogic.tps** and **SAuto.tps**.

To make the ProDoc installation work correctly, these files must all be copied to the **same folder location** on the backup drive relative to their folder location in their original drive.

Follow the steps in the following section, **Restoring from a Backup** whenever it becomes necessary to restore files from the backup you have made.

## RESTORING FROM A BACKUP

Like backing up files, restoring is a matter of specifying what, when, where, and how. You probably chose to restore data files because your hard disk was replaced or reformatted, or perhaps you have reinstalled the ProDoc document assembly program (and perhaps the SOS program as well). Here is what you can expect out of your new installation depending on what was previously backed up, from the least effective to the most effective backup routines:

1. If you have **only** used the backup utility from ProDoc or SOS, your client, case and document listing will be restored and your case answers will also be restored. You will need to reassemble your documents, and any modifications or additions to forms will *not* be made to the documents unless you re-enter the modifications before reassembling. Any changes to documents made through your word processor and saved will not be included.
2. If you also backed up your completed documents, these will be available as before.
3. If you used the backup utility from ProDoc or SOS, and also backed up your completed documents and any modified files, your new installation will basically operate exactly as it did before.

If you used a commercial backup program to do your backups, you should follow the program's instructions as well as those below. The steps in the following procedure assume you use the Windows Explorer program to locate and copy the backed up files.

**Restoring Backed up Data Files.**

This procedure assumes that the ProDoc program (and the SOS program, if subscribed to) was successfully installed from a CD. If you encountered problems during this installation process, call Customer Support at **1-800-759-5418** for help.

Perform the following steps to restore your backed up data files.

1. Restore files backed up with the ProDoc or SOS backup utility.
   a. If you **don't** use SOS: In ProDoc, Click **Tools → Backup Data Files → Restore.**
      i. If you are using a network installation, ensure no other users are logged in and click **Yes** on the warning window. If ProDoc is not networked, click **Yes** on the warning window.
      ii. Click **Restore** on the next warning window.
      iii. Enter the location of the backup files in the **Files to Restore Location** window. Click **OK.** Your client, case and document list will be restored.
   b. ProDoc *and* SOS users: Perform these steps in SOS if you performed backups through SOS:
      i. Click **Utilities → Back up data files → Restore data files.**
      ii. Enter the backup file location on the **Files to restore location** window. Click **OK.** Your data files will be restored for both ProDoc and SOS.
2. If you backed up your **completed documents,** locate the backup folder location.
   a. Users who used default document locations can then copy either the **c:\Clients** folder to the ProDoc installation directory, **c:\ProDoc** if installed to the default location on a stand-alone computer, or copy all backup folders named after clients to the **Clients** folder in the ProDoc installation folder. If you see a warning about overwriting existing files, confirm that these should be overwritten. Your backed up documents will then be restored.
   b. Users who did not use default document locations should copy the backup document folder(s) to the same location on the drive in which these were placed before. Your backed up documents will then be restored and can be accessed through the **Clients & Cases Document Manager** if they are restored to the same location.
3. Users who modified document formatting or master forms, or created supplemental forms and questions should locate and restore these files. If nothing was changed or not backed up, you can skip this step.
   a. If you used the steps under **Backup Procedure** in the **Backing Up Files** section, you backed up the following files:
      i. In the ProDoc installation directory (by default, **c:\ProDoc**): Any existing **xxxgcfg.ini** files (**xxx** is each user's login initials/name) and **Global.cif.**

ii. In each volume folder: Any files with the extensions **.doc, .wpd, .wp, .cif** or **.ini** and any files named **Docgrps.tps, grpitems.tps, Sdocs.tps, SLogic.tps** and **SAuto.tps.**

b. Copy these files **and** all volume folders to the ProDoc installation directory and overwrite existing files.

c. If you have created and backed up any supplemental volumes, you must place these back on the volume listing. Click **Tools → Registration → Edit Volume List** and add the information required for the supplemental volume(s).

4. If you didn't do so before, set up a backup routine as described in the topic **Backing Up Files**

Your latest ProDoc installation should now run as it did before. If you encounter problems during this process, call Customer Support at **1-800-759-5418** for help.

# Index

## - A -

About ProDoc 5
Adding an Alimony Obligation (Delinquency Calculator) 105
Adding Multiple Alimony Obligations (Delinquency Calculator) 105
Adding Mutiple Child Support Obligations (Delinquency Calculator) 104
Adding New Clients 33
Adjustments Form (Tax Calculator) 160
After Tax Statistics Form (Equitable Distribution System) 142
After Tax Values Form (Equitable Distribution System) 139
Alimony Form (Delinquency Calculator) 104
Allocating Property (Equitable Distribution System) 137
Amortizing the Obligation (Obligation Amortizer) 96
Appendix A 195
Appendix B 198
Appendix C 208
Appendix D 221
Assembly Questions 23
Assets Form (Financial Affidavit (<$50,000)) 151
Assets Form (Financial Affidavit (>=$50,000)) 126
Assets Form (Probate Accounting) 176

## - B -

Backup Options 69
Beneficiaries Form (Probate Management System) 185

## - C -

Calculate Child Support (Child Support Guidelines) 91
Calculator Form (Child Support Guidelines) 94
Calendar Buttons (Probate Management System) 182
Cancel Subscription 84
Capital Transactions Form (Probate Accounting) 175
Caption Form (Financial Affidavit (<$50,000)) 146
Caption Form (Financial Affidavit (>=$50,000)) 121
Case Selection 89
Case Status Form (Probate Management System) 184
Cash on Hand (Probate Accounting) 176
Certified Mailer 76
Certified Mailer (Probate Management System) 189
Certified Mailer Form (Probate Management System) 188
Changing word processor 64
Check for Updates 83
Child Support Form (Delinquency Calculator) 103
Child Support Guidelines Forms (Child Support Guidelines) 91
Child Support Proceedings Form (UCCJEA Affidavit) 117
Children Form (UCCJEA Affidavit) 111
CIF Files 54
Client Employment, Entering (Financial Affidavit (<$50,000)) 147
Client Employment, Entering (Financial Affidavit (>=$50,000)) 122
Clients and Case Settings 72
Clients and Cases Menu 32
Clipboard 191
Common Controls on Browse Windows 191
Compatibility Mode 14
Configuration File 192
Configuration Files 54
Contingent Assets Form (Financial Affidavit (<$50,000)) 153
Contingent Assets Form (Financial Affidavit (>=$50,000)) 128
Contingent Liabilities Form (Financial Affidavit (<$50,000)) 154
Contingent Liabilities Form (Financial Affidavit (>=$50,000)) 129
Copy 192
Copy text 192
Creating Supplemental Forms 221
Creditors Form (Probate Management System) 186
Credits Form (Tax Calculator) 161
Custom Fields Options 73
Customer Support 2
Customize Menu 49
Cut 192
Cut Text 192

# - D -

Default Answers 192
Directory 192
Directory Browse Window 191
Disbursements Form (Probate Accounting) 174
Distributions Form (Probate Accounting) 175
Document Assembly Menu 16
Document Assembly Wizard 16
Document Formatting
  Changing 49
Document Manager 37
Documents Assembled (Equitable Distribution System) 137
Download Updates 83

# - E -

Edit Documents 27
Edit Menu 31
Editing Master Forms 49
Entering Beneficiaries (Probate Management System) 185
Entering Creditor Information (Probate Management System) 186
Entering Other Parties Information (Probate Management System) 187
Entering Property (Equitable Distribution System) 137
Establish Assembly Settings 17
Exempt Homestead Form (Probate Inventory) 167
Expenses Form (Financial Affidavit (<$50,000)) 150
Expenses Form (Financial Affidavit (>=$50,000)) 125
Export Menu 84

# - F -

File Menu 30
Filename 192
Finish Form (Financial Affidavit (<$50,000)) 155
Finish Form (Financial Affidavit (>=$50,000)) 130
Firm Information in Answers
  Changing Case Answers for Firm Information Answers 74
  Setting Defaults for Firm Information Answers 74
Florida PowerPacks 87
Form Sets 193
Formatting Documents 49
Full Accounting (Probate Accounting) 177

# - G -

General Form (Delinquency Calculator) 102
General Form (Equitable Distribution System) 133
General Form (Probate Accounting) 173
General Form (Probate Inventory) 166
General Form (Probate Management System) 183
General Form (Tax Calculator) 158
General Form (UCCJEA Affidavit) 110
General Information Form (Child Support Guidelines) 92
General Information Form (Financial Affidavit (<$50,000)) 147
General Information Form (Financial Affidavit (>=$50,000)) 122
Global 193
Global Questions 193
Glossary 191

# - H -

Headers and Footers 53
Help Menu 86
Highlight 193
Homestead, Exempt (Probate Inventory) 167
Homestead, Nonexempt (Probate Inventory) 168
How ProDoc Assembles Documents 6
How ProDoc Works 198

# - I -

Inaccessible Volumes 80
Income Form (Financial Affidavit (<$50,000)) 148
Income Form (Financial Affidavit (>=$50,000)) 123
Income Form (Tax Calculator) 159
Information Needed (Probate Inventory) 165
Information Needed (Probate Management System) 179
Installing ProDoc 7

# - J -

Judgment Form (Delinquency Calculator) 108

# - L -

Liabilities Form (Financial Affidavit (<$50,000)) 152
Liabilities Form (Financial Affidavit (>=$50,000)) 127
License 193
Limitations (Tax Calculator) 163
Location of files 65
Login 13

# - M -

Main Menu Overview 29
Manage Users 13
Manage Users Login 13
Master Forms 193
Merge Questions 26
Miscellaneous Firm Settings 74
Miscellaneous Personal Settings 68
Monthly Net Income Form (Child Support Guidelines) 93
Multiple Payments, Delinquency Calculator 106

# - N -

Navigating 1
Navigating (Financial Affidavit (<$50 000)) 144
Navigating (Financial Affidavit (>=$50,000)) 119
Navigating (Probate Inventory) 164
Networking ProDoc 195
Nonexempt Homestead Form (Probate Inventory) 168
Nonparty Form (UCCJEA Affidavit) 113

# - O -

Opening (Child Support Guidelines) 91
Opening (Delinquency Calculator) 101
Opening (Equitable Distribution System) 132
Opening (Financial Affidavit (<$50 000)) 144
Opening (Financial Affidavit (>=$50,000)) 119
Opening (Obligation Amortizer) 96
Opening (Payment Splitter) 99
Opening (Probate Accounting) 170
Opening (Probate Inventory) 164
Opening (Probate Management System) 178
Opening (Tax Calculator) 157
Opening (UCCJEA Affidavit) 109
Options - Backup 69
Options - Clients/Cases 72
Options - Custom Fields 73
Options - Firm Info 73
Options - Firm Miscellaneous 74
Options - Graphic Engine 66
Options - Personal Misc. Settings 68
Options - Small Office Suite 69
Options - Timeslips 71
Options - Word Processor 64
Other Parties Form (Probate Management System) 187
Other Proceedings Form (UCCJEA Affidavit) 115
Out of State Real Property Form (Probate Inventory) 169
Overview 1
Overview (Financial Affidavit (<$50 000)) 144
Overview (Financial Affidavit (>=$50,000)) 119
Overview (UCCJEA Affidavit) 109

# - P -

Page Numbers 53
Paste 193
Paste text 193
Payment Allocation Priorities, Delinquency Calculator 107
Payments Form (Delinquency Calculator) 106
Personal Property Form (Probate Inventory) 169
Phone Types Settings 71
PowerPacks
  Florida 87
PowerPacks Menu 41
Pre-tax Statistics Form (Equitable Distribution System) 140
Print Blank Forms 42
Print Case Data Sheet 44
Print Client Lists 43
Print Form Lists 44
Print Global Questions 45
Print Labels 47
Print Menu 41

Print Preview Screen 48
Print QuickText 47
Print Supplemental Questions 45
Print Volume Questions 45
Print Worksheets 46
Printing (Financial Affadavit (>=$50,000)) 121
Printing (Financial Affidavit (<$50 000)) 146
Printing (Probate Management System) 181
Printing Child Support Calculator Worksheet (Child Support Guidelines) 95
Printing the Amortization Schedule (Obligation Amortizer) 97
ProDoc Website 3
Property Form (Equitable Distribution System) 137
Property, Personal (Probate Inventory) 169
Purchases during accounting period (Probate Accounting) 174

# - Q -

Quick Links to Programs 1
QuickText 193

# - R -

Real Property Form (Probate Inventory) 168
Real Property, Out of State (Probate Inventory) 169
Receipts Form (Probate Accounting) 174
Register 193
Register Menu 79
Register This Computer 79
Registering PowerPacks 82
Registration 193
Registration And Setup 11

# - S -

Save location for finished document 65
Saving Documents 27
Scenarios (Equitable Distribution System) 134
Select 193
Select a Case 89
Select Updates 83
Setup 11
Show Volumes 82
Single Payments, Delinquency Calculator 106
SOS Options 69
Statistics Form (Financial Affidavit (<$50,000)) 156
Statistics Form (Financial Affidavit (>=$50,000)) 131
Summary Form (Probate Accounting) 177
Summary Report Form (Tax Calculator) 163
Summation (Probate Accounting) 177
Supervisors and Users 13
Supplemental Forms 194
System Requirements 7

# - T -

Tax Calculator (Tax Calculator) 157
Tax Calculator's Limitations (Tax Calculator) 163
Tax Deductions Form (Tax Calculator) 162
Taxes Form (Financial Affidavit (<$50,000)) 150
Taxes Form (Financial Affidavit (>=$50,000)) 125
Timeslips Extension 208
Timeslips Options 71
Token 194
Toolbar (Child Support Guidelines) 95
Toolbar (Delinquency Calculator) 101
Toolbar (Equitable Distribution System) 136
Toolbar (Financial Affidavit (<$50,000)) 145
Toolbar (Financial Affidavit (>=$50,000)) 120
Toolbar (Probate Inventory) 164
Toolbar (Probate Management System) 179
Toolbar (Tax Calculator) 158
Toolbar (UCCJEA Affidavit) 109
Toolbar Buttons
  Main Menu Toolbar 29
Tools Menu 74
ToolTips 194

# - U -

Updating Property Entries (Equitable Distribution System) 137
Using the Tax Calculator (Tax Calculator) 157

# - V -

Volume 194
Volume Edit Dialog 81
Volume Edit Form 81
Volume Questions 194

# - W -

Warranty 2
WebUpdate
  Check for Updates 83
WebUpdate History 83
WebUpdate Window 83
Welcome to ProDoc 4
Window Menu 86
Word processor 64

proDOC®
Click ... Click, Documents Done!™